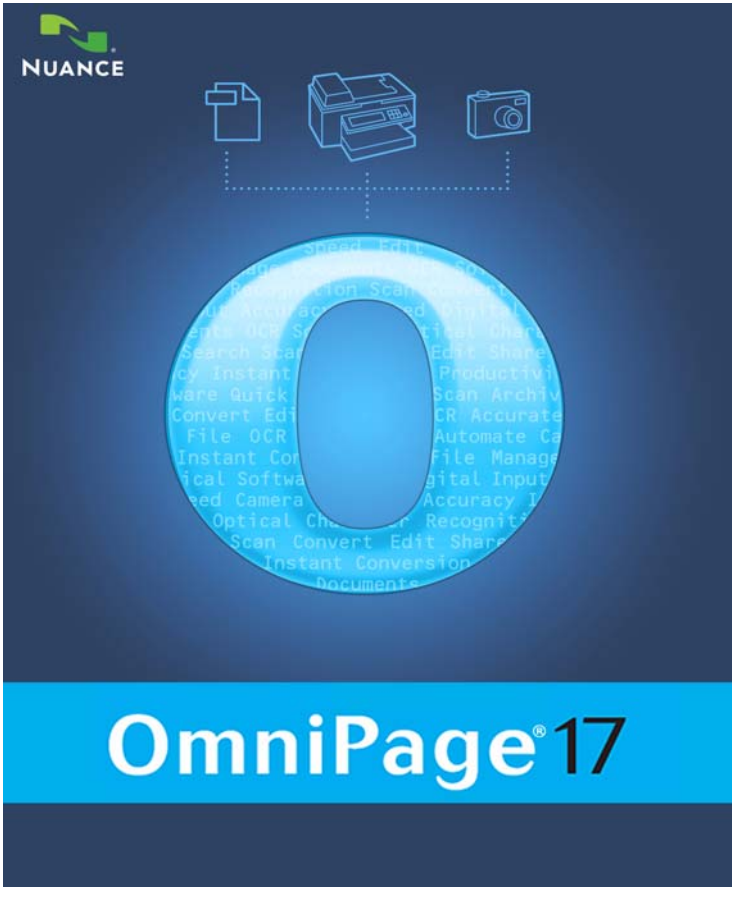

User's Guide

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CONTENTS

WELCOME **5**
New features in OmniPage 17 7

INSTALLATION AND SETUP **11**
System requirements 11
Installing OmniPage 12
Setting up your scanner with OmniPage 14
How to start the program 16
Registering your software 17
Activating OmniPage 18
Uninstalling the software 18

USING OMNIPAGE **20**
OmniPage Documents 20
The OmniPage Desktop and Views 21
Basic Processing Steps 28
How to use OmniPage with PaperPort 29

PROCESSING DOCUMENTS **30**
Processing methods 30
Defining the source of page images 34
Describing the layout of the document 40
Preprocessing Images 42
Zones and backgrounds 48

PROOFING AND EDITING **56**
The editor display and formatting levels 56
Proofreading OCR results 57
Verifying text 58
The Character Map 59

User dictionaries 60
Languages 61
Training 63
Text and image editing 65
On-the-fly editing 67
Marking and redacting 68
Reading text aloud 69
Creating and editing forms 71

SAVING AND EXPORTING **74**
Saving and Exporting 74
Saving original images 75
Saving recognition results 76
Sending pages by mail 81
Sending to Kindle 82
Other export targets 84

WORKFLOWS **85**
Workflow Assistant 88
Batch Manager 90
Creating new jobs 91
Watched folders 96
Watched mailboxes 97
Barcode processing 98
File-it Assistant 100

TECHNICAL INFORMATION **102**
Troubleshooting 102
Supported file types 106

INDEX **108**

Welcome

Welcome to this OmniPage® 17 text recognition program, and thank you for choosing our software! The following documentation has been provided to help you get started and give you an overview of the program.

This User's Guide

This guide introduces you to using OmniPage 17. It includes installation and setup instructions, a description of the program's commands and working areas, task-oriented instructions, ways to customize and control processing, and technical information. Descriptions are based on the Windows Vista™ operating system.

In line with Nuance's environmental policy, the Guide is supplied as a PDF file only. To have a printed copy on normal sized paper, we recommend double-sided printing with two pages per sheet.

This guide is written with the assumption that you know how to work in the Microsoft Windows environment. Please refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.

We also assume you are familiar with your scanner and its supporting software, and that the scanner is installed and working correctly before it is setup with OmniPage 17. Please refer to the scanner's own documentation as necessary.

How-to-Guides

The How-to-Guides can be accessed from the Help menu. They are a series of mini-guides that help you get started easily by providing concise overviews of key program areas, such as getting input, image improvement, zoning, recognition, editing, proofreading, new features, and the like.

Electronic Help

OmniPage Help contains information on features, settings, and procedures. It also has a comprehensive glossary, with its own alphabetical index and a table of contents. The HTML help system has been designed for quick and easy information retrieval. Help is available after you install OmniPage.

Comprehensive context-sensitive help aims to provide just enough assistance to let you keep working without delay. It is available from dialog boxes. Press F1 in any dialog box to access it, or click the help button if the dialog box has one.

Readme File

The Readme file contains last-minute information about the software. Please read it before using OmniPage. To open this HTML file, choose Readme in the OmniPage Installer or afterwards in the Help menu.

Scanning and other information

The Nuance® web site at www.nuance.com provides timely information on the program. The Scanner Guide (http://www.nuance.com/scannerguide/) contains up-dated information about supported scanners and related issues; Nuance tests the 25 most widely used scanner models. Access Nuance's web site from the OmniPage 17 Installer or afterwards from the Help menu.

Tech Notes

The web site at www.nuance.com contains Tech Notes on commonly reported issues using OmniPage 17. Web pages may also offer assistance on the installation process and troubleshooting.

New features in OmniPage 17

If you are upgrading from version 16, you benefit from the following innovations. Click the links to for more information.

- **Asian recognition:** OCR services are provided for Japanese, Korean, Simplified Chinese and Traditional Chinese, with support for both horizontal and vertical text flow and embedded English texts. Results can be viewed and verified in the Text Editor. See "Asian language recognition" on page 61.
- **Vertical non-Asian texts:** Auto-detection of vertical texts in two rotations functions inside table cells and anywhere on PDF or XPS pages, and in certain cases on other image file types. New tools allow vertical text zones to be drawn manually. Texts display vertically and can be edited in the Text Editor, using the True Page® formatting level. In other levels the texts are displayed horizontally. See "Automatic zoning" on page 48. and See "Zone types and properties" on page 49.
- **Easy Loader:** This provides a Windows Explorer-like display of the file system in one of the OmniPage windows, to keep files visible during your work and deliver full Explorer functionality, yielding quick file selections; a dialog box with a lock facility lets a file set be built up before loading starts. With Quick Convert View it allows

not only fast file loading but also 'one-click' total processing: load › recognize › save. See "Input via Easy Loader" on page 36.

- **Expanded ECM support:** New links are available to Hummingbird from OpenText and iManage from Interwoven. When using SharePoint, the server, login and password information must be provided only once per session, and is offered in each subsequent session.
- **Improved support for Office 2007:** The Direct OCR buttons now appear on a separate Nuance OCR tab instead of being mixed with all other Add-Ins.
- **More robust batch processing:** The Batch Manager automatically skips files that cannot be processed – including those blocked by password requirements – without stopping the main flow of work. The Job results window indicates which files were not processed.
- **Running:** The program's launch speed is increased and performance is considerably improved on multi-core computers. Support for quad-core machines is introduced.
- **Linking workflows to scanner buttons:** OmniPage functions and workflows can be associated with scanner buttons, so the whole pre-processing, recognition and storage of documents can be launched from the scanner. See "Scanning to OmniPage and workflows" on page 39.
- **Output to Kindle:** The new Kindle Assistant lets you create workflows to send recognition results to a Kindle account at Amazon and receive them displayed on a Kindle device registered with that account. See "Sending to Kindle" on page 82.

- **Other improvements:** Advances to image pre-processing provide better layout retention and overall accuracy – particularly in XPS files and document-to-document conversions. HD photo (JPEG XR) image loading is now supported. Integration with Microsoft Word, Excel and PowerPoint is enhanced. Linearized PDF files can be created, so they are optimized for faster web viewing. Form layout description is now available in Quick Convert View.

New features in OmniPage 16

If you are upgrading from version 15, you will also benefit from the following innovations:

- **Three screen views**: Choose from Classic (as in OmniPage 15), Flexible and Quick Convert View (all main controls on a single panel). See Chapter 2.
- **Multiple documents:** In Classic or Flexible View you can have two or more documents open at one time, for easy cross-document editing.
- **Digital camera processing**: perform OCR on digital camera images with special algorithms. See Chapter 3.
- **2007 programs**: OmniPage supports the latest Word and Excel inside Office 2007 (DOCX and XLSX), and also provides links for SharePoint 2007 and Outlook 2007.
- **PDF Enhancements**: these include support for PDF version 1.6, faster processing speed, higher accuracy, improved output quality, and the MRC high compression technology for certain PDF flavors.
- **Legal documents**: OmniPage offers high-quality handling and recognition of legal documents.

- **Customizable shortcut menus in Windows Explorer**: send image files or PDFs directly to major Windows programs, process them with your own workflows, or use the Convert Now Wizard for easy conversion control.
- **General improvements**: these include faster processing, better quality output page layout (font matching, table detection, etc.); and a new, intuitive Workflow Assistant.

Key features unique to OmniPage Professional.

- **Extracting data from filled forms**: A workflow step allows data to be extracted from sets of forms and exported to databases, based on a PDF form template. The forms can be active PDF forms, static forms in a range of image formats or scanned paper forms.
- **Marking and redacting**: Text can be highlighted, struckout or redacted (made unreadable) in the Text Editor. Redacting is useful for legal documents or for those with confidential content.
- **File-it Assistant**: A more efficient aid for creating and using barcode cover page workflows. These allow for automatic processing and storage of documents driven by the push of just one scanner button.

A more complete list of features, and the differences between various OmniPage versions appears in Help.

This icon is used throughout the guide to denote features that are available only in OmniPage Professional 17.

OmniPage 17 is supplied in Enterprise versions for network use. It is also supplied in Special Editions for selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Installation and setup

This chapter provides information on installing and starting OmniPage.

System requirements

The minimum requirements to install and run OmniPage 17 are:

- A computer with an Intel® Pentium® III processor or equivalent. Dual-core or Quad-core support recommended.
- Windows® XP 32-bit (from Service Pack 3) with 400 MHz processor, or Windows® Vista™ 32-bit (SP1) or 64-bit (SP1) with a 1 GHz processor.
- 256MB of memory (RAM), 1GB recommended for advanced performance.
- 230MB of free hard disk space for application and sample files plus 70MB working space during installation. Additionally:
    - 170MB for all Nuance RealSpeak® modules (80MB for RealSpeak® Solo American English language module, additional 9-11MB per RealSpeak Solo other language modules)
    - 95MB for Nuance PDF Create! (Supplied with OmniPage Professional 17 only).
    - 150MB for PaperPort® (Supplied with OmniPage Professional 17 only).
- 1024x768 pixel color monitor with 16-bit color or greater video card.
- A sound card and speaker for reading text aloud.

- A CD-ROM drive for installation or web access suitable for download.
- A Windows compatible pointing device.
- 2 megapixel digital camera or higher for digital camera text capture. See Help for details.
- A compatible scanner with its own scanner driver software, if you plan to scan documents. See the Scanner Guide at Nuance's web site (www.nuance.com) for a list of supported scanners.
- Web access is needed for product activation and registration, Scanner Wizard database updating and obtaining live updates for the program.
- East Asian language handling must be installed in the operating system to view Japanese, Chinese or Korean documents. (Control Panel / Regional and Language Options).
- To save DOCX and XPSX files (for Microsoft Office 2007 Word and Excel) or to load and save XPS files (XML Paper Specification), you should have or install Microsoft .NET Framework 3.0. The link to the Microsoft download page can be found in the Release Notes, or in the application About box, if enabled under Options / General. Alternatively, click the OmniPage .Net Framework balloon tooltip.

Installing OmniPage

OmniPage 17's installation program takes you through installation with instructions on every screen.

Before installing OmniPage:

- Close all other applications, especially anti-virus programs.
- Log into your computer with administrator privileges.

- If you own a previous version of OmniPage, or if you are upgrading from demonstration software or an OmniPage Special Edition, the installer asks your consent to uninstall that product.

To install OmniPage:

1. Download the program file and choose Run when the download is completed, or insert the OmniPage CD-ROM in your CD-ROM drive. The installation program should start automatically. If it does not start, locate your CD-ROM drive in Windows Explorer and double-click the Autorun.exe program at the top-level of the CD-ROM.
2. Choose a language to use during installation. Accept the End-User License Agreement and enter the serial number you receive by e-mail or find on the CD envelope.
3. Choose a complete or a custom installation. A complete installation installs all RealSpeak™ Text-to-Speech language modules (currently 9). Custom installation lets you exclude or add modules. To exclude a module, click its down arrow and select 'This feature will not be available'.
4. Follow the instructions on each screen to install the software. All files needed for scanning are copied automatically during installation.

Unless deselcted in the OmniPage Professional installation, Nuance PDF Create 5 installation starts as soon the installation of OmniPage is completed. Document-to-document conversions depend on PDF Create being present.

OmniPage Professional is supplied with a complimentary copy of the Nuance PaperPort® document management product. This must be installed separately and has its own system requirements.

Setting up your scanner with OmniPage

All files needed for scanner setup and support are copied automatically during the program's installation, but no scanner setup occurs at installation time. Before using OmniPage 17 for scanning, your scanner should be installed with its own scanner driver software and tested for correct functionality. Scanner driver software is not included with OmniPage.

Scanner setup is done through the Scanner Setup Wizard. You can start this yourself, as described below. Otherwise, it appears when you first attempt to perform scanning. Proceed as follows:

- Choose Start › All Programs › Nuance › OmniPage 17 › Scanner Setup Wizard

  or click the Setup button in the Scanner panel of the Options dialog box.

  or choose Scan in the Get Page drop-down list in the OmniPage Toolbox and click the Get Page button.
- The Scanner Setup Wizard starts. If you have a web connection, the first panel invites you to update the scanner database supplied with the wizard. Choose Yes or No and click on Next.
- Choose 'Select and test scanner or digital camera', then click Next. If you have a single installed scanner, it appears, along with any scanners previously set up with OmniPage. If the required scanner is not listed, click Add Scanner... .
- You see a list of all detected scanner drivers in the checkmarked categories. This can include network devices. Select one and click OK. To install a second device, you must run the Scanner Wizard again.

- The wizard reports whether the chosen scanner model already has settings in the scanner database. If it does, you do not need to test it. If it does not, you should test it. Click on Next.
- If you chose not to test, click Finish. If you chose testing, click Next to have the scanner connection tested. If the connection is in order, you see a menu of further tests. Choose which testing steps you want to run. The Basic test scan is recommended.
- By default OmniPage uses its own scanning interface, located in the Scanner panel of the Options dialog box. If you want to use your scanner's own interface instead, choose Advanced settings... and select this. Click Hint editor... and choose Edit hints... only if you are experienced in configuring scanners or have been advised by Technical Support to do so.
- Click Next to start the tests. For the Basic scan test, insert a test page into your scanner. The wizard will scan using your scanner manufacturer's software. Click on Next. Your scanner's native user-interface will appear.
- Click on Scan to begin the sample scan.
- If necessary, click on Missing Image... or Improper Orientation... and make the appropriate selections.
- Once the image appears correctly in the window, click on Next.
- Move through the remaining requested tests, following the instructions on the screen.
- When all the requested tests have been completed successfully, the Scanner Wizard reports and invites you to click on Finish.
- You have successfully configured your scanner to work with OmniPage 17!

To change the scanner settings at a later time, or to setup or remove a scanner, reopen the Scanner Setup Wizard from the Windows Start menu or from the Scanner panel of the Options dialog box.

To test and repair an improperly functioning scanner, open the wizard and select 'Test the current scanner or digital camera' in the second panel, then work through the procedure described above, maybe using advice received from Technical Support.

To specify a different default scanner, open the wizard to reach the list of setup scanners. Move the highlight to the desired scanner and be sure to close the wizard with Finish.

To get updated settings for your current scanner, open the wizard, request a fresh database download in the first screen, then choose 'Use current settings with current device', click Next and then Finish.

How to start the program

To start OmniPage 17 do one of the following:

- Click Start in the Windows taskbar and choose All Programs › Nuance › OmniPage 17 › OmniPage [Professional] 17.

•Double-click the OmniPage icon in the program's installation folder or on the Windows desktop if placed there.

•Double-click an OmniPage Document (OPD) icon or file name; the clicked document is loaded into the program. See "OmniPage Documents" in the next chapter.

- Right click one or more image file icons or file names for a shortcut menu. Select Open With... OmniPage application. The images are loaded into the program.

On opening, OmniPage's title screen is displayed and then a view selection panel. OmniPage has three basic view types. For details, see The OmniPage Desktop and Views in the next chapter. It provides an introduction to the program's main working areas.

There are several ways of running the program with a limited interface:

- Use the Batch Manager program. Click Start in the Windows taskbar and choose All Programs › Nuance › OmniPage 17 › OmniPage Batch Manager. See the Workflows chapter.
- Click Acquire Text from the File menu of an application registered with the Direct OCR™ facility. See "How to set up Direct OCR" in the Processing Documents chapter.
- Right-click on one or more image file icons or file names in Wndows Explorer for a shortcut menu. Select OmniPage 17 and choose a target format, or the Convert Now Wizard or a workflow from its sub-menu. The files will be processed according to the workflow instructions. See the Workflows chapter.
- Click the OmniPage Agent icon on the taskbar. Choose a workflow to start the program and run the workflow.
- Use OmniPage 17 with Nuance's PaperPort document management product, to add OCR services. See "How to use OmniPage with PaperPort" in the Using OmniPage chapter.

Registering your software

Nuance's online registration runs at the end of installation. Please ensure web access is available. We provide an easy electronic form that can be completed in less than five minutes. When the form is filled, click Submit. If you did not register the software during

installation, you will be periodically invited to register later. You can go to www.nuance.com to register online. Click on Support and from the main support screen choose Register in the left-hand column. For a statement on the use of your registration data, please see Nuance's Privacy Policy.

Activating OmniPage

You will be invited to activate the product at the end of installation. Please ensure that web access is available. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. OmniPage 17 can be launched only five times without activation. We recommend Automatic Activation.

Uninstalling the software

Sometimes uninstalling and then reinstalling OmniPage will solve a problem. The OmniPage Uninstall program will not remove files containing recognition results or any of the following user-created files:

Zone templates (*.zon)
Image enhancement templates (*.ipp)
Training files (*.otn)
User dictionaries (*.ud)
OmniPage Documents (*.opd)
Job files (*.opj)
Workflow files (*.xwf)

To uninstall you must be logged into your computer with administrator privileges.

To uninstall or reinstall OmniPage:

- Close OmniPage.
- Click Start in the Windows taskbar and choose the Control Panel and then Uninstall a program (in earlier Windows versions: Add/Remove Programs).
- Select OmniPage and click Uninstall (in earlier Windows versions: Remove).
- Click Yes in the dialog box that appears to confirm removal.
- Select Yes to restart your computer immediately, or No if you plan to restart later.
- Follow instructions until the process is finished.

When you uninstall OmniPage, the link to your scanner is also uninstalled. You must setup your scanner again with OmniPage if you reinstall the program. All RealSpeak modules that were installed with the program will also be uninstalled.

With OmniPage 17 Professional, Nuance PDF Create 5 and PaperPort must be uninstalled separately.

Using OmniPage

OmniPage 17 uses optical character recognition (OCR) technology to transform text from scanned pages or image files into editable text for use in your favorite computer applications.

In addition to text recognition, OmniPage can retain the following elements and attributes of a document through the OCR process.

Graphics (photos, logos)

Form elements (checkboxes, radio buttons, text fields)

Text formatting (character and paragraph)

Page formatting (column structures, table formats, headings, placing of graphics).

Documents in OmniPage

A document in OmniPage consists of one image for each document page. After you perform OCR, the document will also contain recognized text, displayed in the Text Editor, possibly along with graphics, tables and form elements.

OmniPage Documents

An OmniPage Document (.opd) contains the original page images (optionally pre-processed) with any zones placed on them. After recognition, the OPD also contains the recognition results.

An OmniPage Document can contain an embedded user dictionary, training file, zone template file, or an image enhancement template file. This can increase file size considerably but makes the OPD

more portable. To embed a file, open the relevant dialog box from the Tools menu, select the desired file and click Embed. Use the Extract button to get a local copy of an embedded file inside an OPD you have received.

When you open an OmniPage Document, its settings are applied, replacing those existing in the program.

The OmniPage Desktop and Views

OmniPage comes with three different views to suit your task.

- **Classic View** - This view has a similar look and feel to previous versions of OmniPage.
- **Flexible View** - This view provides an alternate layout of the OmniPage function panels stacked in a tabbed view to give each panel more space.
- **Quick Convert View** - This view is designed for quick and easy document conversion without having to learn a lot. The most important conversion options are clearly visible on one screen.

Use the Window menu to switch between views and to save your own custom view (see later). On starting a new session you receive the view and screen arrangement that was in force when the program was last closed.

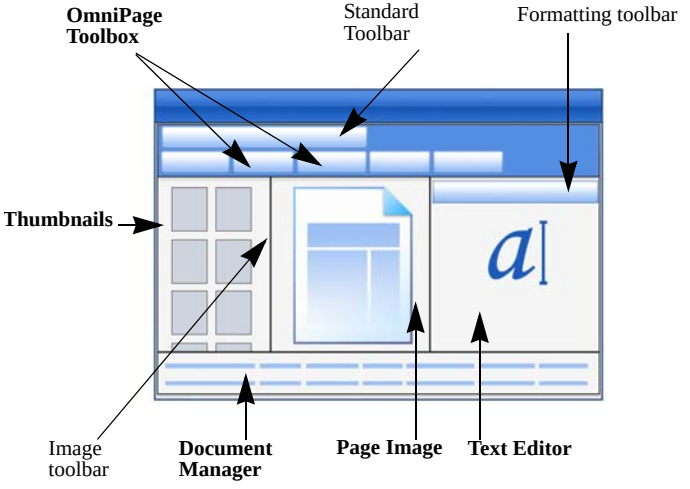
Program Panels

OmniPage has seven panels that can be docked (tabbed or tiled), floated, resized, minimized and restored separately: Thumbnails, Page Image, Text Editor, Document Manager, Easy Loader, Workflow Status, and Help. To float a panel double-click its title bar or tab. To restore the floating panel to its previous docked

position, double-click its title bar. To dock it to a new location, drag it to an edge. A purple rectangle shows the docking position - release the mouse button to dock it. To move a floating panel without docking displays, keep CTRL pushed while dragging. To see all possible docking positions one after the other (tiles and tabs), drag the panel over the OmniPage main window, holding down the left mouse button and pressing the spacebar repeatedly. When the desired location shows purple, release the mouse button.

Classic View

In Classic View, the default OmniPage Desktop has four main tiled working areas, separated by splitters: the Document Manager, the Page Image, Thumbnails and the Text Editor. The Page Image has an Image toolbar and the Text Editor has a Formatting toolbar.



OmniPage toolbox: This Toolbox lets you drive the processing.

Thumbnails panel: This displays page thumbnails.

Document Manager: This provides an overview of your document with a table. Each row represents one page. Columns present statistical or status information for each page, and (where appropriate) document totals.

Page Image: This displays the image of the current page with its zones. When a page is displayed, the Image toolbar is available.

Text Editor: Displays recognition results from the current page.

Panels can be re-arranged freely - horizontally or vertically; use the Window menu to open the Easy Loader, Workflow Status or Help panels. Panels can be minimized or closed, but not tabbed. To restore the default Classic View appearance, choose Reset Current View in the Window menu.

Flexible View

Use this view to set up the OmniPage workspace so that it fits your task optimally. By default all panels appear. There are five tabs: Page Image (including Thumbnails), Text Editor, Easy Loader, Workflow Status and Help. The Document Manager appears in a horizontal panel at the base of the working area. You can undock, move, minimize, group or close panels as already described. Drag a tab onto the working area to convert it to a Classic-type tiled panel. Drag it back to the tab bar to revert to a tabbed panel, or use the Spacebar as already described. If panels are grouped, the tab name shows the active one. To restore the default Flexible View appearance, choose Reset Current View in the Window menu.

Easy Loader provides a Windows Explorer type file listing and functionality that can remain open during the session, allowing quick file selection and assembly (see Chapter 3).

Suggested scenarios:

Maximizing workspace (single screen)

Load a document. Open the panels you want to use. Grab them by their captions one by one, and drag them so that they dock behind the active one as tabs. You can also dock Help to avoid handling two separate windows.

Working with recognition results (single screen)

Load a document and have it recognized. Close all panels except the Document Manager and the Text Editor. Maximize both horizontally, scale down the Document Manager and dock it to the top or bottom. You can now step through the pages double-clicking them one by one in the Document Manager, inspecting recognition results in the Text Editor. The number of suspect words and reject characters in the Document Manager will help you identify problematic pages.

Handling large documents (dual-screen)

Load the document you want to work on. Move its Thumbnail View to your second monitor and maximize it for a large scale overview of your document and far more space for thumbnail operations.

Verifying (dual-screen)

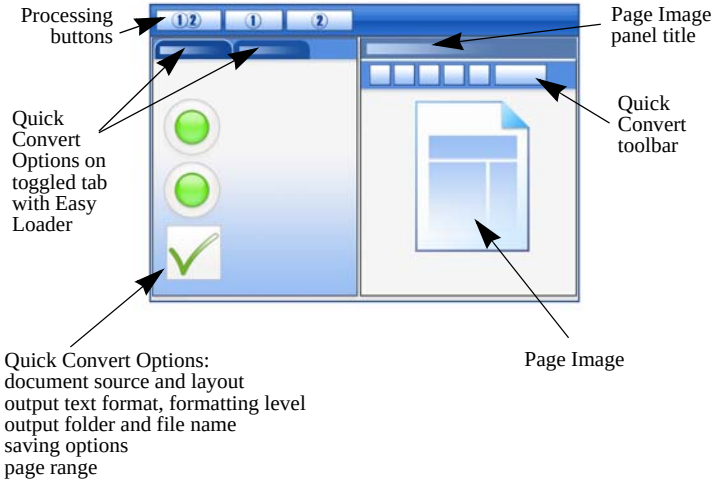
Place the Page Image on one screen and the Text Editor on the other. This gives you more space for editing and proofing.

The Page Image is always available for verifying recognition and for performing on-the-fly zoning and editing.

The scenarios presented above are only examples to give you an idea of what you can do in Flexible View.

Quick Convert View

Use the Quick Convert View for fast recognition and saving. You can switch to Quick View only when you have no opened document and it can handle only one input file and one output document at a time. The picture shows the default appearance.



The Easy Loader is by default on a tab that toggles with the Quick Convert Options panel. A Help panel can be added, but further panels are not available in this view. You can change tabs to separate panels and minimize them, as in other views.

After loading a file, you should convert it before loading the next file. When an image conversion is finished, you do not need to explicity close the image; just load a new file.

The Easy Loader in Quick View provides an additional feature: 'one-click' processing. Choose the Easy Loader sub-menu in the Process menu and choose either Load Files or Get and Convert. When the latter is chosen, multiple files can be selected – these files are loaded, recognized and saved using the current settings. For this, set the output file names to be the same as the source file names. See Chapter 3 and Help for detail.

The Quick View Page Image panel includes the Quick Convert toolbar, offering the most useful image handling operations. To access advanced functionality, such as image file saving, SET tools, on-the-fly zoning, zone reordering and manual zone drawing for vertical text, a different view should be used.

Custom views

For a custom view, arrange the panels and toolbars as you wish, then choose Window › Custom Views › Manage. Click Add and name your view. Your screen layouts will be displayed in the Custom Views submenu with a checkmark beside the active one. Resetting to a default is not available for custom views.

Changing views

Use the Window menu to change views. Panels are shown or hidden and arranged as they were when the chosen view was last

used. The Help topic on display remains unchanged regardless of view. Easy Loader retains its file location regardless of view and the Workflow Status continues to display information on the last workflow run. On program restart, Help displays the Welcome topic, Easy Loader the default folder location and Workflow status is empty.

The Toolbars

The program has eleven main toolbars. Use the View menu to show, hide or customize them. Status bar texts at the bottom edge of the OmniPage program window explain the purpose of all tools.

Standard toolbar: Performs basic functions.

Image toolbar: Performs image, zoning and table operations. Three of its tool groups can now be handled separately (mini-toolbars):

- Zones toolbar: Offers zoning tools.
- Rotate toolbar: Provides rotating tools.
- Table toolbar: Inserts, moves and removes row and column dividers.

Formatting toolbar: Formats recognized text in the Text Editor.

Verifier toolbar: Controls the location and appearance of the verifier.

Reorder toolbar: Modifies the order of elements in recognized pages.

Mark Text toolbar: Performs text marking and redacting.

Form Drawing toolbar: Creates new form elements.

Form Arrangement toolbar: Arranges and aligns form elements.

All toolbars can be moved and customized in each view to your particular needs, including use of a secondary monitor.

The Form toolbars and the Mark Text toolbar (for details see Chapter 4) appear only in OmniPage Professional 17.

Basic Processing Steps

There are three ways of handling documents: with automatic, manual or workflow processing. The basic steps for all processing methods are broadly the same:

1. Bring a set of images into OmniPage. You can scan a paper document with or without an Automatic Document Feeder (ADF) or load one or more image files.

2. Perform OCR to generate editable text. After OCR, you can check and correct errors in the document using the OCR Proofreader and edit the document in the Text Editor.

3. Export the document to the desired location. You can save your document to a specified file name and type, place it on the Clipboard, send it as a mail attachment or publish it. You can save the same document repeatedly to different destinations, different file types, with different settings and levels of formatting.

Using OmniPage, you can choose from the following processing methods: Automatic, Manual, Combined, or Workflow. You can start recognition from other applications, using Direct OCR and can also schedule processing to run at a later time.

Processing methods are detailed in the next chapter and in Help.

Settings

The Options dialog box is the central location for OmniPage settings. Access it from the Standard toolbar or the Tools menu. Context-sensitive help provides information on each setting.

How to use OmniPage with PaperPort

The PaperPort® program is a paper management software product from Nuance. It lets you link pages with suitable applications. Pages can contain pictures, text or both. If PaperPort exists on a computer with OmniPage, its OCR services become available and amplify the power of PaperPort. You can choose an OCR program by right-clicking on a text application's PaperPort link, selecting Preferences and then selecting OmniPage 17 as the OCR package. OCR settings can be specified, as with Direct OCR.

PaperPort provides the easiest way to turn paper into organized digital documents that everybody in an office can quickly find and use. PaperPort works with scanners, multifunction printers, and networked digital copiers to turn paper documents into digital documents. It then helps you to manage them along with all other electronic documents in one convenient and easy-to-use filing system.

PaperPort's large, clear item thumbnails allow you to visually organize, retrieve and use your scanned documents, including Word files, spreadsheets, PDF files and even digital photos. PaperPort's Scanner Enhancement Technology tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

PaperPort is included in the OmniPage Professional package. For application information, refer to PaperPort's own documentation. PaperPort must be installed and uninstalled separately from OmniPage.

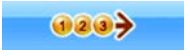
Processing documents

This tutorial chapter describes different ways you can process a document and also provides information on key parts of this processing.

Processing methods

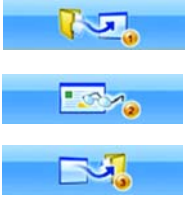
Using OmniPage, you can choose from the following processing methods:

Automatic



A fast and easy way to process documents is to let OmniPage do it automatically for you. Select settings in the Options dialog box and in the OmniPage Toolbox drop-down lists and then click *Start*. It will take each page through the whole process from beginning to end, when possible running in parallel. It will typically auto-zone the pages.

Manual



Manual processing gives you more precise control over the way your pages are handled. You can process the document page-by-page with different settings for each page. The program also stops between each step: acquiring images, performing recognition, exporting. This lets you, for instance, draw zones manually or change recognition language(s). You start each step by clicking the three buttons on the OmniPage Toolbox.

1. Use button one to get a set of images.
2. Manually zone pages where you want to process only part of the page or if you want to give precise zoning instructions. Use ignore backgrounds or zones to exclude areas from processing. Use process backgrounds or zones to specify areas to be auto-zoned.
3. Use button two to have the pages recognized.
4. Do proofing and editing as desired.
5. Use button three to save your results.

The default for manual processing is to have all entered pages automatically selected. This way you can have all new pages recognized by a single mouse click. You can remove this default in the Process panel of the Options dialog box.

Combined

You can process a document automatically and view results in the Text Editor. If most pages are in order, but a few have not turned out as expected, you can switch to manual processing to adjust settings and re-recognize just those problem pages. Alternatively, you can acquire images with manual processing, draw zones on some or all of them, and then send all pages to automatic processing by pressing the Start button and choosing to process existing pages.

Workflow

A workflow consists of a series of steps and their settings. Typically it will include a recognition step, but it does not have to. It does not have to conform to the 1-2-3 pattern of traditional processing. Workflows are listed in the Workflow drop-down list – sample workflows plus any you create. Workflows allow you to handle recurring tasks more efficiently, because all the steps and their settings are pre-defined. You can choose to place the OmniPage Agent icon on your taskbar.

Its shortcut menu lists your workflows. Click a workflow to launch OmniPage and have it run.

Let the Workflow Assistant guide you in creating new workflows. It provides a choice of steps and the settings they need. Click Next after each step to add another one. You can use the Assistant just to get more guidance when doing automatic processing. See "Workflow Assistant" in Chapter 6.

At a later time

You can schedule OCR jobs or other processing jobs in OmniPage Batch Manager to be performed automatically at a later time, when you may not even be present at your computer. This is done through the Batch Manager. It does not matter if your computer is turned off after the job is set up, so long as it is running at job start time. If you are scanning pages, your scanner must be functioning at job start time, with the pages loaded in the ADF.

When you choose New Job, first the Job Wizard, and then the Workflow Assistant appears - the latter with a slightly modified set of choices and settings. In the first panel of the Job Wizard, you define your job type and name your job; next you are to specify a starting time, a recurring job or watched folder instructions.

A job incorporates a workflow with timing instructions added. See "Batch Manager" in Chapter 6.

Processing from other applications

You can use the Direct OCR™ feature to call on the recognition services of OmniPage while you work in the following applications: Microsoft Office XP or higher, Corel WordPerfect 12 or X3. First you must check the Enable Direct OCR check box under Tools › Options › General. Then, two buttons in Office 2007's

Nuance OCR tab, or in an OmniPage toolbar open the door to OCR facilities.

How to set up Direct OCR

Start the application you want connected to OmniPage. Start OmniPage, open the Options dialog box at the General panel and select *Enable Direct OCR*.

In the target application, use the Acquire Text Settings button in the OmniPage toolbar (in Office 2007 go to the Nuance OCR tab). Select options in the following panels:

- **OCR:** languages, dictionaries, layout, fonts.
- **Process:** Image pre-processing, choices for PDF opening, feature retention.
- **Output format:** Set a formatting level
- **Direct OCR:** Automatic or manual zoning, perform or skip proofing, image source.
- **Scanner:** Set-up or change scanner settings.

These function for future Direct OCR work until you change them again; they are not applied when OmniPage is used on its own.

How to use Direct OCR

1. Open your application and work in a document. To acquire recognition results from scanned pages, place them correctly in the scanner.

2. Use the OmniPage toolbar button Acquire Text Settings or the same item in the target application's File menu (or the Nuance OCR tab in Office 2007) to review your recognition settings, if necessary; the Direct OCR panel lets you specify input from scanner, image file or digital camera image files.

3. Use the OmniPage toolbar button Acquire Text or the same item in the File menu (use the Nuance OCR tab in Office 2007) to acquire images from the specified source.
4. If you selected *Draw zones automatically* in the Direct OCR panel of the Options dialog box, under Acquire Text Settings, recognition proceeds immediately.
5. If *Draw zones automatically* is not selected, each page image will be presented to you, allowing you to draw zones manually. Click the Perform OCR button to continue with recognition.
6. If proofing was specified, this follows recognition. Then the recognized text is placed at the cursor position in your application, with the formatting level specified in the Output Format panel under Acquire Text Settings.

Defining the source of page images

There are three possible image sources: from image files, from a digital camera and from a scanner. There are two main types of scanners: flatbed or sheetfed. A scanner may have a built-in or added Automatic Document Feeder (ADF), which makes it easier to scan multi-page documents. The images from scanned documents can be input directly into OmniPage or may be saved with the scanner's own software to an image file, which OmniPage can later open.

Input from image files

You can create image files from your own scanner, or receive them by e-mail or as fax files. OmniPage 17 can open a wide range of image file types. Select *Load Files* in the Get Pages drop-down list. Files are specified in the Load Files dialog box. This appears when you start automatic processing. In manual processing, click the Get Page

button or use the Process menu. The lower part of the dialog box provides advanced settings, and can be shown or hidden.

The minimum width or height for an image file is 16 by 16 pixels; the maximum is 8400 pixels (71cm or 28 inches at the resolution 201 to 600 dpi). See Help for pixel limits.

You can govern how PDF files are opened under Tools / Options / Process: open with the text layer or as image, import tag information to assist layout retention and whether to use PDF fonts or the mapped system fonts.

In OmniPage Professional 17, files can also be imported from FTP locations, Microsoft SharePoint 2003 and 2007, Hummingbird, iManage and ODMA-compliant sources.

Input from digital camera

You can bring digital camera photos of documents for recognition into OmniPage. First, make sure that your device driver is installed properly. Then connect the camera and download images. Click Load Digital Camera Files in the Get Page drop-down list. If you use this, 3D Deskew, resolution enhancement and straightening text lines are automatically performed on images. You can also do manual 3D deskewing, see the section "Image Enhancement tools" later in this Chapter.

To acquire digital camera photos containing text from Direct OCR or PaperPort, mark the Load as digital camera image checkbox. The above mentioned automatic enhancements will apply.

For tips and advice on working with digital camera images see the How-to-Guides and Help.

Input via Easy Loader

This provides the Windows Explorer interface in an OmniPage window. In Flexible and Quick Views it appears by default. Choose Easy Loader in the Window menu to add it to Classic View or to show or hide it in other views. It lets you browse your whole file system and efficiently select files to be loaded into OmniPage. Choose Process / Easy Loader / Folder to view files as Lists, Thumbnails, Tiles, Icons (arranged as desired) or Details, as you do in Explorer. The Loader can remain displayed as you work.

Easy Loader is driven from the Process menu. Instead of selecting files to send them straight to OmniPage you can choose Queue Window to get a dialog box with a lock. Turn the lock on to build up and re-order a list of files, maybe coming from different folders. The lock applies to all files collected to enter the currently open document. When the list is ready, turn the lock off to start loading. If the lock is off from the start, files are listed only if they are selected faster than OmniPage can load them. Practically, you can load a few files, send them to recognition and while that is underway, build up the rest of the input list.

Turning on the menu item *Show/hide Queue Window automatically* causes the window to appear whenever files are listed but not yet loaded and to be closed as soon as the list is empty.

Easy Loader can be used in Classic and Flexible Views to compile files for multiple documents. Engage the lock, make document 1 active and collect files. Then make document 2 active and collect its files, and so on. When all is ready, remove the lock. Each document has its own lock, but the Process menu offers *Lock all* and *Unlock all* to lock or release all files destined for all documents. You can remove selected files with *Delete*, or all files in the current document's list with *Delete All* or *Clear* in the Process menu. Use *Clear all* to clear all files destined for all open documents. See a tutorial in Help on loading files for multiple documents.

Easy Loader is available as a panel in Quick Convert View. The Process menu has two commands unique to Quick View.

- **Get and Convert** offers 'one-button' processing - files are loaded, passed through recognition and saved to files using existing settings. Only in this case, multiple file selection is allowed with Quick View; the result is one output document for each input file – before starting you should choose under Output file name *Same as the source file name.*
- **Load Files** performs file loading without recognition, as in other views. In Quick View it allows only one file to be loaded at a time - it should be processed before selecting a new input file. In this case the Queue Window and its lock play no useful role.

Easy Loader can process digital camera images. Set this in the Quick Convert Options panel before invoking Easy Loader. If *Scan* is set as input, this setting is temporarily ignored and pages are loaded as normal (non-camera) images.

All Windows Explorer functionality is available in Easy Loader. For instance, you can also select files and use the shortcut menu item OmniPage 17 to send them via background processing to MS Excel, MS Word, PDF, RTF, Text and WordPerfect. Existing settings are used and by default generated files are placed in the input folder. Use the Convert Now Wizard to access basic settings, such as whether or not to view results in the target application. This wizard lets you do immediate conversions or call the Workflow Assistant to access all settings, for instance to change target file names and locations. This shortcut menu item also offers all workflows that have image file input.

Input from scanner

You must have a functioning, supported scanner correctly installed with OmniPage 17. You have a choice of scanning modes. In making your choice, there are two main considerations:

- Which type of output do you want in your export document?
- Which mode will yield best OCR accuracy?

Scan black and white

Select this to scan in black-and-white. Black-and-white images can be scanned and handled quicker than others and occupy less disk space.

Scan grayscale

Select this to use grayscale scanning. For best OCR accuracy, use this for pages with varying or low contrast (not much difference between light and dark) and with text on colored or shaded backgrounds.

Scan color

Select this to scan in color. This will function only with color scanners. Choose this if you want colored graphics, texts or backgrounds in the output document. For OCR accuracy, it offers no more benefit than grayscale scanning, but will require much more time, memory resources and disk space.

Brightness and contrast

Good brightness and contrast settings play an important role in OCR accuracy. Set these in the Scanner panel of the Options dialog box or in your scanner's interface. After loading an image, check its appearance. If characters are thick and touching, lighten the brightness. If characters are thin and broken, darken it. Then rescan

the page. If your scanning results are still not satisfactory, open the scanned image in the Image Enhancement window to edit it using a range of different tools.

Scanning with an ADF

The best way to scan multi-page documents is with an Automatic Document Feeder (ADF). Simply load pages in the correct order into the ADF. You can scan double-sided documents with an ADF. A duplex scanner will manage this automatically.

Scanning without an ADF

Using OmniPage's scanner interface, you can scan multi-page documents efficiently from a flatbed scanner, even without an ADF. Select *Automatically scan pages* in the Scanner panel of the Options dialog box, and define a pause value in seconds. Then the scanner will make scanning passes automatically, pausing between each scan by the defined number of seconds, giving you time to place the next page.

Scanning to OmniPage and workflows

Go to Tools / Options / Scanners to choose an action to be performed when a button on your local scanner is pushed. This can be simple scanning resulting in images loaded into OmniPage. It is also possible to select a scanner-based workflow from those you have created or choose to be prompted to select a workflow whenever the button is pressed. Use the Control Panel button to associate OmniPage with a scanner event (a scanner button being pressed). Then a button press launches OmniPage, runs the workflow and sends the results to the defined target, with or without interaction.

In OmniPage Professional this feature can also be used to initiate barcode-driven workflows (see Chapter 6).

Document-to-document conversion

In OmniPage Professional 17 you can open not only image files, but also documents created in word-processing and similar applications. Supported file types include .doc, .xls, .ppt, .rtf, .wpd and others. Click the Load Files button in the OmniPage Toolbox or select the Load Files command under Get Page, in the File menu. In the Load Files dialog box, choose Documents. When you are finished, you can choose from a wide variety of document file types for saving. These conversions require Nuance PDF Create to be installed.

Describing the layout of the document

Before starting recognition you are requested to describe the layout of the incoming pages to assist the auto-zoning process. When you do automatic processing, auto-zoning always runs unless you specify a template that does not contain a process zone or background. When you do manual processing, auto-zoning sometimes runs. See online Help: *When does auto-zoning run*? Here are your input description choices:

Automatic
Choose this to let the program make all auto-zoning decisions. It decides whether text is in columns or not, whether an item is a graphic or text to be recognized and whether to place tables or not.

Single column, no table
Choose this setting if your pages contain only one column of text and no table. Business letters or pages from a book are normally like this.

Multiple columns, no table
Choose this if some of your pages contain text in columns and you want this decolumnized or kept in separate columns, similar to the original layout.

Single column with table
Choose this if your page contains only one column of text and a table.

Spreadsheet
Choose this if your whole page consists of a table which you want to export to a spreadsheet program, or have treated as single table.

Form
Choose this if your whole page consists of a form and you want form elements auto-recognized. After recognition, you can modify form element properties, create new ones, or edit form layout. This option is available in OmniPage Professional 17 only.

Legal pleading
Choose this to recognize legal documents. Legal headers are detected and removed. Choose to have pleading numbers retained or dropped.

Custom
Choose this for maximum control over auto-zoning. You can prevent or encourage the detection of columns, graphics and tables. Make your settings in the OCR panel of the Options dialog box.

Template
Choose a zone template file if you wish to have its background value, zones and properties applied to all acquired pages from now on. The template zones are also applied to the current page, replacing any existing zones.

If auto-zoning yielded unexpected recognition results, use manual processing to rezone individual pages and re-recognize them.

Preprocessing Images

To improve OCR results, you can enhance your images before zoning and recognition using the Image Enhancement tools. To open the Image Enhancement window, click the SET - Enhance Image button in the Image Toolbar, or click Tools and choose SET - Enhance Image. You can also build Image Enhancement steps into your workflows by choosing the Enhance Images step.

The input for Image Enhancement is the Primary image.

We must distinguish three types of image:

Original image: The image created by your scanner or contained in a file before it enters the program.

Primary image: The state of the original image after it has been loaded into OmniPage, possibly modified by automatic or manual pre-processing operations.

OCR image: A black-and-white image derived from the primary image, optimized for good OCR results.

Some tools affect the Primary image, others the OCR image. Be sure you know which image you are editing.

Good brightness and contrast settings play an important role in OCR accuracy. Set these in the Scanner panel of the Options dialog box or in your scanner's interface. The diagram illustrates an optimum brightness setting. After loading an image, check its

appearance. If characters are thick and touching, lighten the brightness. If characters are thin and broken, darken it. Use the OCR Brightness tool to optimize the image.

Image Enhancement Tools

The Image Enhancement tools can also be used to edit images to save and use them as image files. Note that some these tools work on the Primary image, others on the one used for OCR (OCR image). Click the Primary/OCR Image button in the Image Enhancement window, to see the current state of either image.

The Image Enhancement window has two panels. The left panel shows the starting image. Your changes are shown in the right preview panel. When you click Accept, the right image is moved to the left panel to become the new starting image for further enhancement.

The following tools are accessible on the toolbar; their usage is detailed as follows:

P - affects Primary image only.

O - affects OCR image only.

PO - can be applied to either the Primary or OCR image (or both)

P+O - a single action is applied to both the Primary and OCR image.

P/O - affects both images.

WH - applies to whole images only.

AR - can be applied to selected image areas.

Pointer (F5) - the Pointer is a neutral tool carrying out different operations under different circumstances (for example, to pick a color for the Fill operation, or to catch the deskew line.) PO.

Zoom (F6) - click the tool then use the left mouse button to zoom in on your image or the right mouse button to zoom out. You can also use the mouse wheel for zooming in and out - even in the inactive view. In the active view the "+" and "-" buttons serve the same purpose. P+O. WH.

Select Area (F7) - click this, then on a tool that can work on a page area (marked AR) and draw your selection on the image. Image enhancement tools by default work on the whole page. Selection has three modes (in the View menu): Normal, Additive, and Subtractive. PO. AR.

Primary/OCR Image - click this tool to switch between the primary and the OCR image in the active view. Primary images can be of any image mode, while an OCR image is its black-and-white version, generated purely for OCR purposes. P/O. WH.

Synchronize Views - click this tool to zoom and scroll the inactive view to the same zoom value and scroll position as the active view. To make the inactive view dynamically follow the focus of the active one, click View then choose the Keep Synchronized command. PO. WH.

The following SET tools allow you to modify image contents:

Brightness and Contrast - click this tool to adjust the brightness and contrast of your primary image or a selected part of it. Use the sliders in the tool area to achieve the desired effect. P. AR.

Hue / Saturation / Lightness - click this tool then use the sliders to modify the hue, saturation and lightness of your primary image. P. AR.

Crop - to use only a part of your image, click the Select Area tool, then the Crop tool and select the area to keep – the rest of the image will be removed. P+O. WH › AR

Rotate - click this tool to rotate (by 90, 180 or 270 degrees) and/or flip your image. P+O. WH.

Despeckle - click this tool to remove stray dots from your image. Despeckle works on the OCR image at 4 levels of severity. You can also use this tool not to remove noise from the page but to strengthen letter outlines: to do this mark the checkbox Inverse despeckling. O. AR.

OCR Brightness - use this tool the set Brightness and Contrast of your OCR image. See the diagram of optimum brightness under Preprocessing Images above. O. AR.

Dropout color - click this tool and select Red, Green, Blue or choose a color from the primary image with the Select Area tool. Sections of the scanned image in this color will be set transparent. The tool has its effect on the OCR image. P/O. WH.

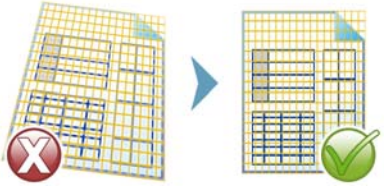
Resolution - use this tool to decrease the resolution of your primary image in percentages. Note that you cannot adjust a resolution higher than that of the original one. P. WH.

Deskew - sometimes pages are scanned crookedly. To straighten the lines of text manually, use the Deskew tool. (Auto-deskew is also available in the Process panel of Options.) P+O. WH.

3D Deskew - use this tool to remove perspective distortion from digital camera images. This is particularly useful when you want to check the results of automatic 3D Deskew or you prefer to do 3D deskew manually after a Load Files step. P+O. WH.

Fill - use this tool to apply a color to the image or a selected part of it. PO. AR.

3D Deskew works by snapping the distorted image to a grid. All you need to do is to manually straighten this grid, and image coordinates will follow - see illustration below (before - after 3D Deskew).



Using Image Enhancement History

To commit or undo your image edits (one by one or all the steps), use the History panel in the Image Enhancement window. Once you have modified the original image, its preview displays the changes,

but they are not done until you click the Apply button next to the History list. Modifications not added to the History by clicking the Add button will not be applied.

Any time you want to see what output a certain step resulted in, double click it in the History list.

To discard changes you have performed with a given tool, but before applying it, select the step in the list, then click the Reset button.

To restore the image as it was before you started the current enhancement session, click the Discard all changes button.

Saving and applying templates

If you have a number of similar images to enhance, you can build up a list of enhancement steps to apply to all of them.

To create and store an image enhancement template, first bring an image file into the Image Enhancement window, then carry out your preprocessing steps and add them to the History clicking the Apply button. When you are done, choose Save Enhancement Template from the File menu. Browse to your preferred destination and save the template file (with the extension .ipp).

To carry out the set of modifications saved in the template file on another image, simply open the new image in the Image Enhancement window and choose Load Enhancement Template from the File menu.

Image Enhancement in Workflows

To incorporate image enhancement in a workflow choose its icon in the Workflow Assistant. The following options are available:

Display images for manual enhancement - during the execution of a workflow, each loaded image will be displayed for manual editing.

Apply enhancement template - an already saved enhancement template will be applied automatically to the image while being processed by the workflow.

Apply enhancement template and display - the workflow will apply the selected image enhancement template, and will also display the image so that you can make further edits to it.

Zones and backgrounds

Zones define areas on the page to be processed or ignored. Zones are rectangular or irregular, with vertical and horizontal sides. Page images in a document have a background value: process or ignore (the latter is more typical). Background values can be changed with the tools shown. Zones can be drawn on page backgrounds with the tools shown under Zone Types and Properties (see later).

Process areas (in process zones or backgrounds) are auto-zoned when they are sent to recognition.

Ignore areas (in ignore zones or backgrounds) are dropped from processing. No text is recognized and no image is transferred.

Automatic zoning

Automatic zoning allows the program to detect blocks of text, headings, pictures and other elements on a page and draw zones to enclose them.

You can Auto-zone a whole page or a part of it. Automatically drawn zones and template zones have solid borders. Manually drawn or modified zones have dotted borders.

Auto-zone a page background

Acquire a page. It appears with a process background. Draw a zone. The background changes to ignore. Draw text, table or graphic zones to enclose areas you want manually zoned. Click the

Process background tool (shown) to set a process background. Draw ignore zones over parts of the page you do not need. After recognition the page will return with an ignore background and new zones round all elements found on the background.

Auto-zoning vertical text

If you set Japanese, Korean or Chinese as the recognition language, auto-zoning will find text blocks and detect the text direction. Vertical Asian text appears horizontally in the Text Editor, but can be exported as vertical - see Chapter 5.

Auto-zoning detects vertical texts in non-Asian languages in table cells and anywhere on Normal PDF or XPS pages. Multi-line detection is possible in these cases.

For image-only PDF and XPS files, and for all other image file or scanner input, auto-detection works with the following conditions:

- It must be only a single line of text
- It must be on the left or right of a diagram or picture or
- It must be situated on the left or right edge of the page - it does not have to extend over the full height of the page.

Vertical text outside tables can be manually zoned, as described below. This allows multiple vertical lines to be handled correctly.

Vertical texts can be viewed and edited with a vertical cursor in the Text Editor using True Page. In other formatting levels the text is placed horizontally.

Zone types and properties

Each zone has a zone type. Zones containing text can also have a zone contents setting: alphanumeric or numeric. The zone type and zone contents together constitute the zone properties. Right-click in a zone for a shortcut menu allowing you to change the zone's

properties. Select multiple zones with Shift+clicks to change their properties in one move.

The Image toolbar provides zone drawing tools, one for each type.

Process zone

Use this to draw a process zone, to define a page area where auto-zoning will run. After recognition, this zone will be replaced by one or more zones with automatically determined zone types.

Ignore zone

Use this to draw an ignore zone, to define a page area you do not want transferred to the Text Editor.

Text zone

Use this to draw a text zone. Draw it over a single block of text. Zone contents will be treated as flowing text, without columns being found. Use it for texts using the Latin, Greek or Cyrillic alphabets and for horizontal texts in the Asian languages.

Vertical Asian text zone

Use this to draw text zones for vertical text in Japanese or Chinese. Zones should be rectangular.

Vertical left-rotated text zone

Use this to draw text zones for vertical text that is left rotated (non-Asian languages only). The zones should be rectangular.

Vertical right-rotated text zone

Use this to draw a text zone for vertical text that is right rotated (non-Asian languages only). The zones should be rectangular.

Table zone

Use this to have the zone contents treated as a table. Table grids can be automatically detected, or placed manually. Table zones should be rectangular. Vertical texts in tables cannot be zoned manually – they can be auto-detected in gridded tables.

Graphic zone

Use this to enclose a picture, diagram, drawing, signature or anything you want transferred to the Text Editor as an embedded image, and not as recognized text.

Form zone

Use this to enclose an area of your document containing form elements such as a checkbox, radio button, text field or anything you want transferred to the Text Editor as a form element. Afterwards, in True Page, you can edit form layout, and modify the properties of form elements. Form zones are available in OmniPage Professional 17 only.

Working with zones

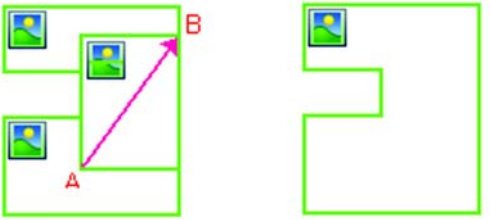
The Image toolbar provides zone editing tools. Grouped tools can be undocked/floated an re-docked as a separate mini toolbar for convenience. One is always selected. When you no longer want the service of a tool, click a different tool. Some tools on this toolbar are grouped. If docked as a single tool, only the last selected tool from the group is visible. To select a visible tool, click it.

To draw a single zone select the zone drawing tool of the desired type, then click and drag the cursor.

To resize a zone, select it by clicking in it, move the cursor to a side or corner, catch a handle and move it to the desired location. It cannot overlap another zone.

To make an irregular zone by addition draw a partially overlapping zone of the same type.

To join two zones of the same type draw an overlapping zone of the same type (drawn zones on the left, resulting zone on the right).



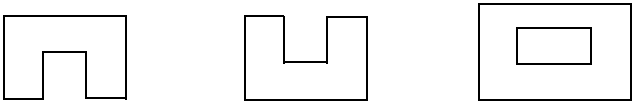
To make an irregular zone by subtraction draw an overlapping zone of the same type as the background.

To split a zone draw a splitting zone of the same type as the background.

A full set of zoning diagrams appear in Help.

When you draw a new zone that partly overlaps an existing zone of a different type, it does not really overlap it; the new zone replaces the overlapped part of the existing zone.

The following zone types are prohibited:



Speed zoning lets you do manual zoning quickly. Activate the zone selection cursor, then move the cursor over the page image. Shaded areas will appear showing the auto-detected zones. Double-click to transform a shaded area into a zone.

Table grids in the image

After automatic processing you may see table zones placed on a page. They are denoted with a table zone icon in the top left corner of the zone. To change a rectangular zone to or from a table zone, use its shortcut menu. You can also draw table type zones, but they must remain rectangular.

You draw or move table dividers to determine where gridlines will appear when the table is placed in the Text Editor. You can draw or resize a table zone (provided it stays rectangular) to discard unneeded columns or rows from the outer edges of a table.

Using the table tools you can insert row and column dividers; move and remove dividers. Click the Place/Remove all dividers tool to have dividers in a table auto-detected and placed.

You can specify line formatting for table borders and grids from a shortcut menu. You will have greater choice for editing borders and shading in the Text Editor after recognition.

Using zone templates

A template contains a page background value and a set of zones and their properties, stored in a file. A zone template file can be loaded to have template zones used during recognition. Load a template file in the Layout Description drop-down list or from the Tools menu. You can browse to network locations to load templates created by others.

When you load a template, its background and zones are placed:

- on the current page, replacing any zones already there
- on all further acquired pages
- on pre-existing pages sent to (re-)recognition without any zones.

With manual processing the template zones in the first two cases can be viewed and modified before recognition.

With automatic processing the template zones can be viewed and modified only after recognition.

With workflow processing, use the zone images step. This combines two steps: load templates and manual zoning. To use a zone template, click the Add button in the appropriate panel of the Workflow Assistant, and select the zone template file to use. Then make your choice between displaying images for manual zoning; applying the zone template; or applying it and display the images.

Templates accept ignore and process zones and backgrounds. They can therefore be useful to define which parts of the pages to process with auto-zoning, and which parts to ignore. Process zones or process background areas from a template may be replaced during recognition by a set of smaller zones; specific zone types will be assigned to these zones.

How to save a zone template

Select a background value and prepare zones on a page. Check their locations and properties. Click Zone Template... in the Tools menu. In the dialog box, select [zones on page] and click Save, then assign a name and optionally a different path. Choose a network location to share the template file. Click OK. The new zone template remains loaded.

How to modify a zone template

Load the template and acquire a suitable image with manual processing. The template zones appear. Modify the zones and/or properties as desired. Open the Zone Template Files dialog box. The current template is selected. Click Save and then Close.

How to unload a template

Select a non-template setting in the Layout Description drop-down list. The template zones are not removed from the current or existing pages, but template zones will no longer be used for future processing. You can also open the Zone Template Files dialog box, select [none] and click the Set As Current button. In this case, the layout description setting returns to Automatic.

How to replace one template with another

Select a different template in the Layout Description drop-down list, or open the Zone Template Files dialog box, select the desired template and click the Set As Current button. Zones from the new template are applied to the current page, replacing any existing zones. They are also applied as explained above.

How to remove a template file

Open the Zone Template Files dialog box. Select a template and click the Remove button. Zones already placed by this template are not removed. Template files can be deleted only from the operating system.

How to include a template file in an OPD

Open a document, then click Tools and choose Zone Template. Select the one you want to include and click Embed. Then save the document to the OPD format. This means the template will travel with the OPD if it is sent to a new location. When the OPD file is opened later, the included zone template will be shown in the Zone Template Files dialog box as [embedded] and can be saved to a new named template file at the new location by using the Extract button.

Proofing and editing

Recognition results are placed in the Text Editor. These can be recognized texts, tables, forms and embedded graphics. This WYSIWYG (What You See Is What You Get) editor is detailed in this chapter. Asian text handling is in some respects different from other languages. See "Asian language recognition" on page 61.

The editor display and formatting levels

The Text Editor displays recognized texts and can mark words that were suspected during recognition with red, wavy underlines. They are displayed with red characters in the OCR Proofreader.

A word may be suspect because it was not found in any active dictionary: standard, user or professional. It may also be suspect as a result of the OCR process, even if it is found in the dictionary. If the uncertainty stems from certain characters in the word, these are shown with a yellow highlight, both in the Editor and the OCR Proofreader.

Choose to have non-dictionary words marked or not in the Proofing panel of the Options dialog box. All markers can be shown or hidden as selected in the Text Editor panel of the Options dialog box. You can also show or hide non-printing characters and header/footer indicators. The Text Editor panel also lets you define a unit of measurement for the program and a word wrap setting for use in all Text Editor formatting levels except Plain Text.

OmniPage 17 can display pages with three levels of formatting. You can switch freely between them with the three buttons at the bottom left of the Text Editor or from the View menu.

Plain Text
This displays plain decolumnized left-aligned text in a single font and font size, with the same line breaks as in the original document.

Formatted Text
This displays decolumnized text with font and paragraph styling.

True Page
True Page® tries to conserve as much of the formatting of the original document as possible. Character and paragraph styling is retained. Reading order can be displayed by arrows.

Proofreading OCR results

After a page is recognized, the recognition results appear in the Text Editor. Proofreading starts automatically if that was requested in the Proofing panel of the Options dialog box. You can start proofing manually any time. Work as follows:

1. Click the Proofread OCR tool in the Standard toolbar, or choose Proofread OCR... in the Tools menu.
2. Proofing starts from the current page, but skips text already proofed. If a suspected error is detected, the OCR Proofreader dialog box colors the suspect word in its context, adds a yellow highlight to any suspect characters and provides a picture of how the word originally looked in the image. The explanation says 'Suspect word' or 'Non-dictionary word'.
3. If the recognized word is correct, click Ignore or Ignore All to move to the next suspect word. Click Add to add it to the current user dictionary and move to the next suspect word.
4. If the recognized word is not correct, modify the word in the Edit panel or select a dictionary suggestion. Click Change or

Change All to implement the change and move to the next suspect word. Click Add to add the changed word to the current user dictionary and move to the next suspect word.

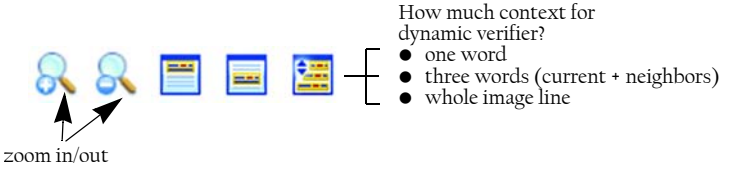
5. Color markers are removed from words in the Text Editor as they are proofread. You can switch to the Text Editor during proofing to make corrections there. Use the Resume button to restart proofing. Click Page Ready to skip to the next page and Document Ready or Close to stop proofreading before the end of the document is reached.

6. A page is marked with the proofed icon on its thumbnail and in the Document Manager if proofing ran to the end of the page. Choose Recheck Current Page... from the Tools menu to re-proof a page.

Verifying text

After performing OCR, you can compare any part of the recognized text against the corresponding part of the original image, to verify that the text was recognized correctly.

The verifier tool is in the Formatting toolbar. The verifier can also be controlled from the Tools menu. Hover the cursor over a verifier display to obtain the verifier toolbar. Use it as follows:



To turn the Verifier on, click the Verifier tool or press F9. To turn it off, click the Verifier tool again, press F9 again, or press Esc.

A full list of verifier keyboard shortcuts is available in Help.

The Character Map

The Character Map is a dockable tool giving you aid in proofing. It is used for essentially two purposes:

- to insert characters during proofing and editing that are not or not easily accessible from your keyboard. In this respect, it is very similar to the system Character Map.
- to show all characters validated by the current recognition languages.

To access the Character Map, click its button in the Formatting Toolbar, or choose Character Map from the View menu and click Show.

Under the Character Map menu item, you can also choose to display recent characters only, or different character sets (by default only two are displayed). Asian characters are not supported.

You can access the Character Map in other ways, such as:

- Click Tools › Options and choose the OCR tab. Click the Additional Characters button to select characters to be included in proofing. Similarly, you can modify the Reject Character by using the Character Map.
- Select Train Character under the Tools menu. Click the (...) button beside the Correct field.
- Select Train Character from the shortcut menu of a suspect or non-dictionary word in the Text Editor.

User dictionaries

The program has built-in dictionaries for many languages. These assist during recognition and may offer suggestions during proofing. They can be supplemented by user dictionaries. You can save any number of user dictionaries, but only one can be loaded at a time. A dictionary called Custom is the default user dictionary for Microsoft Word.

Starting a user dictionary
Click Add in the OCR Proofreader dialog box with no user dictionary loaded or open the User Dictionary Files dialog box from the Tools menu and click New.

Loading or unloading a user dictionary
Do this from the OCR panel of the Options dialog box or from the User Dictionary Files dialog box.

Editing or removing a user dictionary
Add words by loading a user dictionary and then clicking Add in the OCR Proofreader dialog box. You can add and delete words by clicking Edit in the User Dictionary Files dialog box. You can also import words from OmniPage user dictionaries (*.ud). While editing a user dictionary, you can import a word list from a plain text file to add words to the dictionary quickly. Each word must be on a separate line with no punctuation at the start or end of the word. The Remove button lets you remove the selected user dictionary from the list.

To embed a user dictionary in an OmniPage Document, load your input file, choose Tools › User Dictionary; select the user dictionary you want to use, click Embed, and name it. Then save to the file type OmniPage Document.

Languages

The program can read over 120 languages with multiple alphabets: Latin, Greek, Cyrillic, Chinese, Japanese and Korean. See the full language list in the OCR panel of the Options dialog box. It shows which languages have dictionary support. A listing is also provided on the Nuance web site.

In addition to user dictionaries, specialized dictionaries are available for certain professions (currently medical, legal and financial) for some languages. See the list and make selections in the OCR panel of the Options dialog box.

Asian language recognition

Four languages with Asian alphabets are supported: Japanese, Korean, Traditional Chinese and Simplified Chinese. The ideal font size for body text is 12 points, scanned at 300 dpi, resulting in characters with around 48 x 48 pixels. Minimum is 30 x 30, that is 10.5 points at 300 dpi. For smaller characters, 400 dpi should be used. Asian texts can be horizontal (left-to-right) or vertical (top-to-bottom, right-to-left). Operating systems supported by OmniPage 17 can handle Asian languages, but if East Asian language support was not selected during system install, it must be added from Control Panel / Regional and Language Settings / Languages / Supplemental language support / Install files for East Asian languages. You may be required to insert a Windows system disk.

The four Asian languages are listed alphabetically with the others in the Options/OCR panel. You should select only one of these languages at a time and avoid a multiple selection with other languages. Asian OCR can handle short embedded English texts without English being explicitly set; this is not designed for longer English texts or for texts in other Western languages. Vertical text is typical in Japanese and Chinese - English may be embedded there

in different orientations. The program can handle these; in the output they appear right-rotated.

Beside the language list the option *Verify language choices* invokes automatic language detection that warns of differences between a detected language and the language setting. It works at page-level and identifies four categories: Japanese, Chinese, Korean and non-Asian. It cannot distinguish between Traditional and Simplified Chinese or between non-Asian languages. The last category means Japanese, Chinese or Korean characters were not detected. Verification takes place during image pre-processing, so the required recognition language must be set before image loading.

Auto-layout and auto-zoning are recommended for Asian pages. This places all detected texts into text zones; by choosing an Asian recognition language you set Asian OCR to run in these zones and that can automatically detect and transmit the text direction, coping with mixed areas of horizontal and vertical texts on a page.

However, the zoning tool lets you force vertical Asian recognition by manual zoning. Please draw rectangular zones with this tool. To manually zone horizontal Asian text, use the usual text zone type. Do not use the two other vertical-text tools on Asian texts. Drawing a vertical Asian zone does not automatically enable an Asian language, nor influence the language auto-detection.

Digital camera images are accepted for Asian languages. However, the automatic 3D deskew algorithm is unlikely to be useful - certainly not for vertical texts. Preferably use the standard image loading command and perform manual 3D deskewing with the relevant SET tool if required. In general, SET tools can be used on Asian images.

Recognized Asian pages appear in the Text Editor, provided your system has support for East Asian languages - always with horizontal text direction. There is no need to specify Asian fonts

under Options/OCR, a default font is automatically applied - typically Arial Unicode MS. Other Asian-capable fonts on your system can be chosen in the Text Editor. Editor support allows text viewing and verifying - Formatted Text is recommended as formatting level. Large-scale editing and spell-checking are better done in the target application. Proofing, training and dictionary support are not available for Asian texts. Therefore, prior to performing Asian OCR, go to the Proofing panel under Options and disable dictionary word marking, automatic proofreading and IntelliTrain and ensure that no training file is loaded. Redaction can be applied to Asian texts, either by selection or searching. The workflow step Form Data Extraction should not be applied to Asian pages.

Typical output converters for Asian texts are RTF, Microsoft Word, Searchable PDF or XPS. The text direction will be as detected during pre-processing. Changes made in the Text Editor - where text is horizontal - will be exported, also to vertical text. Plain Text converters are available (Unicode TXT, Notepad) but here text direction will always be horizontal.

Training

Training is the process of changing the OCR solutions assigned to character shapes in the image. It is useful for uniformly degraded documents or when an unusual typeface is used throughout a document. OmniPage 17 offers two types of training: manual training and automatic training (IntelliTrain). Data coming from both types of training are combined and available for saving to a training file.

When you leave a page on which training data was generated, you will be asked how to apply it to other existing pages in the document.

Manual training

To do manual training, place the insertion point in front of the character you want to train, or select a group of characters (up to one word) and choose Train Character... from the Tools menu or the shortcut menu. You will see an enlarged view of the character(s) to be trained, along with the current OCR solution. Change this to the desired solution and click OK. The program takes this training and examines the rest of the page. If it finds candidate words to change, the Check Training dialog box lists these. Incorrect words should be re-trained before the list is approved.

IntelliTrain

IntelliTrain is an automated form of training. It takes input from the corrections you make during proofing. When you make a change, it remembers the character shape involved, and your proofing change. It searches other similar character shapes in the document, especially in suspect words. It assesses whether to apply the user correction or not.

You can turn IntelliTrain on or off in the Proofing panel of the Options dialog box. IntelliTrain remembers the training data it collects, and adds it to any manual training you have done. This training can be saved to a training file for future use with similar documents.

For examples of IntelliTrain, see Help.

Training files

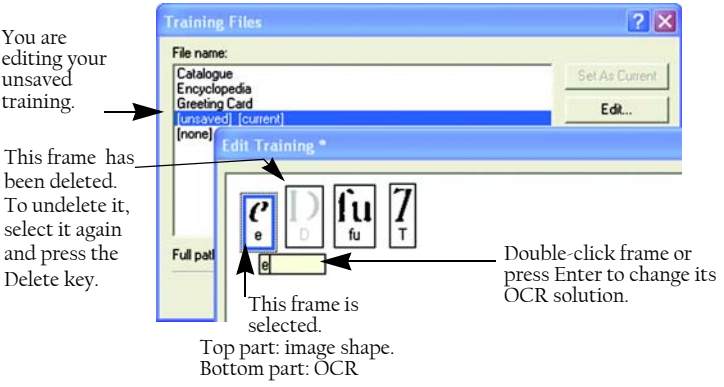
Whenever you close a document or switch to another one when unsaved training data exists, a dialog box appears allowing you to save it. To save a training file into an OPD, load it from Tools › Training File, click Embed, and save to the file type OmniPage Document.

Saving training to file, loading, editing and unloading training files are all done in the Training Files dialog box.

Unsaved training can be edited in the Edit Training dialog box, an asterisk is displayed in the title bar in place of a training file name. Save it in the Training Files dialog box.

A training file can be also edited; its name appears in the title bar. If it has unsaved training added to it, an asterisk appears after its name. Both the unsaved and the modified training are saved when you close the dialog box.

The Edit Training dialog box displays frames containing a character shape and an OCR solution assigned to that shape. Click a frame to select it. Then you can delete it with the Delete key, or change the assignation. Use arrow keys to move to the next or previous frame.



Text and image editing

OmniPage has a WYSIWYG Text Editor, providing many editing facilities. These work very similarly to those in leading word processors.

Editing character attributes
In all formatting levels except Plain Text, you can change the font type, size and attributes (bold, italic, underlined) for selected text.

Editing paragraph attributes
In all formatting levels except Plain Text, you can change the alignment of selected paragraphs and apply bulleting to paragraphs.

Paragraph styles
Paragraph styles are auto-detected during recognition. A list of styles is built up and presented in a selection box on the left of the Formatting toolbar. Use this to assign a style to selected paragraphs.

Graphics
You can edit the contents of a selected graphic if you have an image editor in your computer. Click Edit Picture With in the Format menu. Here you can choose to use the image editor associated with BMP files in your Windows system, and load the graphic. Alternatively, you can use the Choose Program... item to select another program. This will replace the Default Image Editor item. Edit the graphic, then close the editor to have it re-embedded in the Text Editor. Do not change the graphic's size, resolution or type, because this will prevent the re-embedding. You can also edit images before recognition using the Image Enhancement tools.

Tables
Tables are displayed in the Text Editor in grids. Move the cursor into a table area. It changes appearance, allowing you to move gridlines. You can also use the Text Editor's rulers to modify a table. Modify the placement of text in table cells with the alignment buttons in the Formatting toolbar and the tab controls in the ruler.

Hyperlinks
Web page and e-mail addresses can be detected and placed as links in recognized text. Choose Hyperlink... in the Format menu to edit an existing link or create a new one.

Editing in True Page

Page elements are contained in text boxes, table boxes and picture boxes. These usually correspond to text, table and graphic zones in the image. Click inside an element to see the box border; they have the same coloring as the corresponding zones. The Help topic *True Page* provides details on the operations summarized here.

Frames have gray borders and enclose one or more boxes. They are placed when a visible border is detected in an image. Format frame and table borders and shading with a shortcut menu or by choosing Table... in the Format menu. Text box shading can be specified from its shortcut menu.

Multicolumn areas have orange borders and enclose one or more boxes. They are auto-detected and show which text will be treated as flowing columns when exported with the Flowing Page formatting level.

Reading order can be displayed and changed. Click the Show reading order tool in the Formatting toolbar to have the order shown by arrows. Click again to remove the arrows.

Click the Change reading order tool for a set of reordering buttons in place of the Formatting toolbar. A changed order is applied in the formatting levels Plain Text and Formatted Text. It modifies the way the cursor moves through a page when it is exported as True Page.

On-the-fly editing

This allows you to modify a recognized page through re-zoning, without having to re-process the whole page. When on-the-fly editing is enabled, zone changes (deleting, drawing, resizing, changing type) immediately make changes in the recognized page. Conversely, when you modify elements in the Text Editor's True Page formatting level, this changes the zones on that page.

Two linked tools on the Image toolbar control on-the-fly zoning. One of these tools is always active whenever no recognition is in progress.

Click this to activate on-the-fly editing. The red signal shows there are no stored zoning changes.

Click this to turn on-the-fly editing off. Your zoning changes are stored; the on-the-fly tool displays a green signal to show there are stored changes. To activate these changes, do one of the following:

Click the on-the-fly tool with a green signal. The zoning changes will cause changes in the Text Editor.

Click the Perform OCR button to have the whole page (re)recognized, including your zone changes.

For details on how changes are handled in on-the-fly zoning and their effects in the Text Editor, see *On-the-fly processing* in Help.

Marking and redacting

The Mark Text toolbar gives you tools to mark (highlight or strike-out); and to redact text. Use the View menu to have this toolbar displayed. You can float or dock this tool group. Each tool has its equivalent menu item in the Format menu or the Text Editor shortcut menu.

Redacting is blacking out confidential information. It is unreadable and unsearchable. To mark and redact text manually, click the Mark for Redacting tool and use its cursor to select all the text parts you want to redact. They appear with a gray highlight. When you are ready, click the Redact Document tool. Choose to do redaction in a copy (safer) or the original document. If you choose to redact a

copy, both the copy and the original remain open in OmniPage, ready to be saved.

WARNING: If you redact the original document, you cannot retrieve the information you have blacked out.

To find and redact text by searching, select Find and Mark Text from the Edit menu to display the Find, Replace and Mark Text dialog box. Search for text to be marked for redaction. Step through all occurrences and decide for each case whether to redact immediately or mark for redaction. In the latter case, perform the redaction by choosing Close and Redact Document in the Mark Text dialog box or later click the Redact Document button.

You can apply highlighting and striking out either by selection or searching.

Reading text aloud

The Nuance RealSpeak® speech facility is provided for the visually impaired, but it can also be useful to anyone during text checking and verification. The speaking is controlled by movements of the insertion point in the Text Editor which can be mouse or keyboard driven.

To hear text:	Use these keys:
One character at a time, forward or back	Right or left arrow. Letter, number or punctuation names are spoken.
Current word	Ctrl + Numpad 1
One word to the right	Ctrl + right arrow
One word to the left	Ctrl + left arrow
A single line	Place the insertion point in the line
Next line	Down arrow

Previous line	Up arrow
Current sentence	Ctrl + Numpad 2
From insertion point to end of sentence	Ctrl + Numpad 6
From start of sentence to insertion point	Ctrl + Numpad 4
Current page	Ctrl + Numpad 3
From top of current page to insertion point	Ctrl + Home
From insertion point to end of current page	Ctrl + End
Previous, next or any page	Ctrl + PgUp, PgDown or navigation buttons
Typed characters	Each typed character is pronounced separately.

The Text-to-Speech facility is enabled or disabled with the Tools menu item Speech Mode or with the F10 key. A second menu item Speech Settings... allows you to select a voice (for example, male or female for a given language), a reading speed and the volume. You must ensure the language selection is appropriate for the text you want to hear.

You also have the following keyboard controls:

To do this:	**Use this:**
Pause/Resume	Ctrl + Numpad 5
Set speed higher	Ctrl + Numpad +
Set speed lower	Ctrl + Numpad –
Restore speed	Ctrl + Numpad *

All speech systems will be installed with OmniPage 17 if you choose a complete installation. If you perform a custom installation, you can choose the languages you need.

Creating and editing forms

You can bring paper or static electronic forms (distributed mainly as PDF in an office environment) into OmniPage Professional 17, recognize them and edit their content, layout or both - in True Page. Draw form zones over the relevant areas of your image before recognition, or choose Form as recognition layout, then use the two toolbars: Form Drawing and Form Arrangement to make modifications and produce a fillable form and save it in the following formats: PDF, RTF, or XSN (Microsoft Office InfoPath 2003 format). Static forms can be saved to HTML. OmniPage Professional 17 uses the Logical Form Recognition™ technology to create fillable forms from static ones.

Please note that OmniPage supports form creation and editing, however the tools available here are not designed to fill in forms.

The Form Drawing Toolbar

This is a dockable toolbar, displayed in the Text Editor that allows you to create a range of form elements using the following tools:

Selection: Click this tool to be able to select, move, or resize elements in your form.

Text: Use the text tool to add fixed text descriptions on your form such as titles, labels and headers.

Line: The Line tool is mainly used in layout design: click it and draw lines to separate distinct sections in your form.

Rectangle: Click this tool to create rectangles in your form for design purposes.

Graphic: Use this tool to select areas of your form that are to be treated as graphics.

Fill text: Click this tool to create fillable text fields. These are fields where you want people to enter text.

Comb: Use this tool to create a text field consisting of boxes. This is typically used for information such as ZIP codes.

Checkbox: Click this tool and draw Checkboxes - typically for Yes/No questions and marking one or more choices.

Circle text: Its function is similar to the Checkbox element (above): the Circle text tool creates elements that get encircled when selected.

Table: This tool creates tables in your form.

You can also create form elements by right-clicking an existing form element in your recognized form, and choose the Insert Form Object menu item.

The Form Arrangement Toolbar

The tools on this toolbar can be used to line up form elements or to set which one is on top of the others when they overlap. This latter function is useful for example if you want to create a background graphic design for your form.

To set the order of overlapping elements, use the **"Bring to Front"** and **"Send to Back"** buttons.

To align the right/left, top/bottom edges or the centers of the selected form elements

horizontally - use the horizontal alignment tools

vertically - use the vertical arrangement tools.

The commands of the Form Arrangement toolbar are also accessible from the shortcut menu of any form element.

Editing Form object properties

To edit a form object directly select it then right-click the given element to display its shortcut menu. You can edit the appearance or the properties of any form element here. Use the following commands:

Form Object Appearance - use the tabs Borders, Shading and Shadow to design the look of your form elements in a similar way as you would do in a text-editing application.

Form Object Properties - this command gives you access to the element properties such as size, position, name. Properties dynamically vary depending on what type of element you select.

Extracting Form Data

Form data extraction (FDE) is a workflow step. Data is extracted from elements such as fillable fields, check boxes, and option buttons. FDE is a simplified implementation of the full Logical Form Recognition technology.

To create a workflow that contains form data extraction:

- Define the processing input and its settings. Input types include: image PDF, PDF form, image files and forms scanned from paper.
- Choose Extract Form Data in place of recognition, and specify its settings. Set an active PDF form as template. It can be single or multi-page, filled or unfilled. The program determines the location and type of the form fields based on this form template.
- Finish the workflow with a saving step.

OmniPage will extract data from incoming forms, using the specified template. Export is to a comma-separated value text file (.csv) ready to be loaded into a spreadsheet.

Once you select Form Data Extraction in a workflow, only saving steps will follow.

Saving and exporting

Once you have acquired at least one image for a document, you can export the image to file. Once you have recognized at least one page, you can export recognition results. After further recognition you can save a single page, selected pages or the whole document by saving to file, copying to Clipboard or sending to a mailing application. Saving as an OmniPage Document is always possible. OmniPage provides comprehensive support for Office 2007 applications and formats, so long as you have Microsoft .NET Framework 3.0 installed.

A document remains in OmniPage after export. This allows you to save, copy or send its pages repeatedly, for example with different formatting levels, using different file types, names or locations. You can also add or re-recognize pages or modify the recognized text.

With automatic processing and in Batch Manager jobs, you specify where to save first before processing starts.

A workflow may contain one or more saving steps, even to different targets (for instance, to file and to mail). A Batch Manager job must contain at least one saving step. See Chapter 6, "Workflows".

Saving and Exporting

If you want to work with your document again in OmniPage in a later session, save it as an OmniPage Document. This is a special output file type. It saves the original images together with the recognition results, settings and training.

Exporting is done through button 3 on the OmniPage Toolbox. It lists available export targets. Some appear only if access to the target is detected on your computer. Select the desired target then

click the Export Results button to begin export. You can also perform exporting through the Process menu.

Saving original images

You can save original images to disk in a wide variety of file types with or without image enhancement (using the Image Enhancement Tools).

1. Choose Save to File in the Export Results drop-down list. In the dialog box that appears, select Image under Save as.

2. Choose a folder location and a file type. Type in a file name.
3. Select to save the selected zone image(s) only, the current page image, selected page images or all images in the document. For multiple zones or multiple pages, you can have all images in a single multi-page image file, providing you set TIFF, MAX, DCX, JB2 or Image-only PDF or XPS as file type. Otherwise each image is placed in a separate file. OmniPage adds numerical suffixes to the file name you provide, to generate unique file names.
4. Click Options... if you want to specify a saving mode (black-and-white, grayscale, color or 'As is'), a maximum resolution and other settings. For TIFF files, you specify the compression method here.
5. Click OK to save the image(s) as specified. Zones and recognized text are not saved with the file.

Saving recognition results

You can save recognized pages to disk in a wide variety of file types.

1. Choose Export Results... in the File menu, or click the Export Results button in the OmniPage Toolbox with Save to File selected in the drop-down list.
2. The Save to File dialog box appears. Select Text under Save as.
3. Select a folder location and a file type for your document. Select a page range, file options, naming options and a formatting level for the document. See "Selecting a formatting level" on this page.
4. Type in a file name. Click Options... if you want to specify precise settings for the export. See "Selecting converter options" later in this chapter.
5. Click OK. The document is saved to disk as specified. If *View Result* is selected, the exported file will appear in its target application; that is the one associated with the selected file type in your Windows system or in the advanced saving options for your selected file type converter.

Selecting a formatting level

The formatting level for export is defined at export time, in the saving dialog box (Save to File, Copy to Clipboard, Send in Mail or other dialog box). Three of the levels correspond to the format views of the same name in the Text Editor. However, the level to be applied for saving is independent of the formatting view displayed in the Text Editor. When exporting to file or mail, first specify a file type. This determines which formatting levels are available.

The formatting levels are:

Plain Text
This exports plain decolumnized left-aligned text in a single font and font size. When exporting to Text or Unicode file types, graphics and tables are not supported. You can export plain text to nearly all file types and target applications; in these cases graphics, tables and bullets can be retained.

Formatted Text
This exports decolumnized text with font and paragraph styling, along with graphics and tables. This is available for nearly all file types.

Flowing Page
This keeps the original layout of the pages, including columns. This is done wherever possible with column and indent settings, not with text boxes or frames. Text will then flow from one column to the other, which does not happen when text boxes are used.

True Page
This keeps the original layout of the pages, including columns. This is done with text, picture and table boxes and frames. This is offered only for target applications capable of handling these. True Page formatting is the only choice for XML export and for all PDF export, except to the file type 'PDF Edited'.

Spreadsheet
This exports recognition results in tabular form, suitable for use in spreadsheet applications. This places each document page onto a separate worksheet.

When exporting to Microsoft Excel, 'Spreadsheet' is good for saving whole-page tables. Prefer 'Formatted Text' if your document contains smaller tables: each table will be placed on a separate worksheet with non-table parts placed in an index worksheet with hyperlinks to each relevant worksheet

Selecting converter options

Click the Options... button in a saving dialog box to have precise control over the export. This brings up a dialog box with the name of the converter associated with the current file type. It presents a series of options tailored to this file type. First, confirm or change the formatting level, because this influences which other options are presented. Select options as desired. Help details how to do this.

To make changes apply to all future export done with the given converter, select the checkmark *Make changes permanent*. If this is not selected, changes are applied to the current export only and are not saved for future use. Export settings can be changed and saved without a document save – choose Tools/Saving Preferences... .

Using multiple converters

Multiple converters allow you to export to two or more file types in one export step. Choose Multiple in the saving dialog box:

To make your own multiple converter, open the Saving Preferences dialog box from the Tools menu. Choose the heading Multiple converters. Select a converter and click Create from... . This will make a copy of the selected converter that you can freely modify without overwriting the original one.

The new converter appears in the list. Select it and click Options... to specify its settings. You receive a list of all text converters,

followed by all image converters. Checkmark the desired ones. Optionally specify sub-folder paths for each file type.

You can save pages with different formatting levels or file options to the different file types, as defined in their simple converters. A few saving operations cannot be done with multiple converters. These are:

Saving OmniPage Documents
Use a workflow with two saving steps, or perform two separate saves.

Saving to two targets
For instance, you cannot use a multiple converter to save a document to file and also send it in mail. Use a workflow with two saving steps, or perform two separate saves.

Saving different page ranges
You cannot save different page ranges to different file types, because only one set of selected pages can exist at saving time. For the same reason, a single workflow cannot be used either. Perform two separate saves or use two workflows.

Saving to PDF

You have five choices when saving to Portable Document Format (PDF) files. The first four are presented as Text converters, the last one is listed among the Image converters.

PDF (Normal):
Pages are exported as they appeared in the Text Editor in True Page view. The PDF file can be viewed and searched in a PDF viewer and edited in a PDF editor.

PDF Edited:
Use this if you have made significant editing changes in the recognition results. You have three formatting level choices,

including True Page. The PDF file can be viewed, searched and edited.

PDF Searchable Image (formerly PDF Image on Text):
The PDF file is viewable only and cannot be modified in a PDF editor. The original images are exported, but there is a linked text file behind each image, so the text can be searched. A found word is highlighted in the image.

PDF with image substitutes:
As for PDF (Normal), but words containing reject and suspect characters have image overlays, so these uncertain words display as they were in the original document. The PDF file can be viewed, searched and edited.

PDF Image (formerly PDF, image only):
The original images are exported. The PDF file is viewable only and cannot be modified in a PDF editor and text cannot be searched.

Besides the above flavors, you can use other parameters in defining your PDF output by clicking Options:

PDF 1.6
Save to PDF version 1.6 for enhanced security, markup and attachment embedding functionality.

PDF/A
Choose to create PDF/A compliant files to be confident that files display identically regardless of the computer environment and remain readable even after many years of technological evolution.

Tagged PDF
Create a tagged PDF file to preserve its structure. This will ensure logical reading order, correct table structure and more.

PDF MRC

Use this high compression technology for good quality *and* smaller file size. Available for color and grayscale PDF Images or PDF Searchable Images.

Linearized PDF

Choose this to create PDF files optimized for fast loading and display when embedded in web pages.

Password protection

In OmniPage Professional you can set a type and level of encryption and then define an Open password and/or a Permissions password for PDF files.

A smaller range of choices is available for saving to XPS files, provided that you have Microsoft .NET Framework 3.0 installed.

Converting from PDF

To extract text content from a PDF file, load it into OmniPage, recognize it, and save the results to a text format.

A variety of outputs is also available from a PDF file shortcut menu: Word, Excel, RTF, WordPerfect or text. For more options, use the Convert Now Wizard.

Creating PDF files from other applications

The Nuance PDF Create product supplied with OmniPage Professional provides the ability to create Normal PDF files from documents in any print-capable application on your system. Click File / Print and select the printer **ScanSoft PDF Create!** Adjust properties as desired and click OK and supply a file name and location. If *View resulting PDF* is selected, your default PDF viewer displays the result.

Sending pages by mail

You can send page images or recognized pages as one or more files attached to a mail message if you have installed a MAPI-compliant mail application, such as Microsoft Outlook. To send pages by e-mail:

- With automatic processing, select Send in Mail as the setting in the Export Results drop-down list on the OmniPage Toolbox. The Export Options dialog box appears as soon as the last available page in the document is recognized or proofed. After export options are specified, an empty mail message appears with file(s) attached - add recipients and message text as desired.
- With manual processing, select Send in Mail as the setting in the Export Results drop-down list and then click its button. The Export Options dialog box appears immediately and then the mail message with the attachment(s).
- Workflows and jobs accept a Send in Mail export step, but they require the recipients and message text to be specified as workflow settings, so the workflow can be run unattended.

Sending to Kindle

A Kindle reader is an electronic book product from Amazon. The Kindle Assistant in the Tools menu lets you create a simple workflow that sends recognition results to a Kindle account at Amazon; these results are optimized for reader display and appear on the Kindle device registered to that account.

To prepare a Kindle workflow:

1. Have your Kindle reader and its associated e-mail address on hand.

2. Choose Kindle Assistant in the Tools menu.
3. Type in a name for the new workflow.
4. Choose a document source: Scan, Load files or Load digital camera files. With file input, you will be prompted to choose input files when the workflow starts running.
5. Enter the e-mail address linked to your Kindle reader.
6. Provide a name for the output file. All recognition results enter a single file.
7. Choose *Save* to save the workflow for later use, or *Save and Run* to immediately run the workflow and transfer its results to your Kindle device.

This simple workflow has three steps: acquire images, perform OCR and send to Kindle. Recognition is done in English. All other settings take either default values or values optimized for Kindle.

When you run the Kindle Assistant for the first time, a customized output converter is created, called 'Kindle Document'. It converts colored items to grayscale, pictures to 72 dpi and sets Formatted Text to remove any columns. This converter is then available for later processing - with or without workflows.

You can modify the Kindle workflow using the Workflow Assistant, to add other steps and change settings. For instance you can specify a page range or add more saving steps, so the file is not only sent to Kindle, but also saved to file with different settings (for instance with Flowing Page and color retention). Take care not to make modifications that are unsuitable for Kindle - e.g. creating multiple output files, setting non-supported languages etc.

You can also compile workflows targeting Kindle with the Workflow Assistant; set a Send in Mail step, choose the Kindle output converter in its settings and enter the Kindle e-mail address. You can do the same without using a workflow by choosing Send in Mail in the Export results drop-down list.

Please note that at the moment (May 2009) this Kindle service is available from Amazon only in the United States of America. Therefore the Kindle Assistant appears only if English is set as the program interface language.

Other export targets

Turn recognized text into an audio wave file for later listening, using Nuance RealSpeak. A multiple converter is useful for this, allowing you to save the document to file and generate the wave file in one saving step. You must specify the reading language in the converter options for the wave file type.

In OmniPage Professional 17 you can export files to other targets. You can save files to a central server (an FTP site), to Microsoft SharePoint 2003 and 2007, to Hummingbird (Open Text) or iManage (Interwoven). Exporting choices are made in the Export Options dialog box. When you click OK you are directed to FTP or SharePoint log-in and invited to specify the required path.

When using SharePoint, the server, login and password information must be provided only once per session, and it is offered in each subsequent session.

If an ODMA-compliant Document Management System (DMS) is detected in your computing environment, it will be offered. If you have access to more than one DMS, the system default will apply. The ODMA server must be pre-configured to accept the file types to be exported from OmniPage Professional, as defined by their extensions.

See Help for more information on these targets.

Workflows

A workflow contains a series of processing steps and their settings. It can be saved for repeated use whenever you have a task needing the same processing. Workflows usually begin with a scanning or loading step, but they can also start from the document currently open in OmniPage. After that, they do not have to conform to the traditional 1-2-3 processing pattern. Usually a workflow will include a recognition step, but this is not compulsory. For instance, page images can be saved to image files in a different file type or to an OmniPage Document. With or without OCR, any number of saving steps are possible, even to different targets, each with their own export settings.

Workflows are designed for efficient whole-document processing. They can also handle recognizing or saving single or selected pages from a document.

Some workflows run without user interaction. Workflows needing interaction are those with a manual image enhancement step, a manual zoning step, a proofing/editing step, the ones when run-time prompting is requested for input or output file names and paths, or scanning workflows prompting for more pages.

Batch Manager jobs are closely related to workflows. Jobs are created in the Job Wizard which uses the Workflow Assistant in the creation process. Jobs run workflows according to the job parameters (mostly timing instructions) and it is more typical for them to run unattended.

Sample workflows

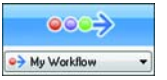
Sample workflows are provided with OmniPage 17 to offer you typical work processes. Choose one in the Workflow drop-down list at the left side of the OmniPage Toolbox.

Click the Workflow Assistant button in the Standard toolbar to see its steps and settings.

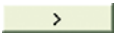
Running workflows

Here is how to run a sample workflow or one you have created:

1. If your workflow takes input from scanner, place your document in its ADF or its first page on the scanner bed.
2. Select the desired workflow from the Workflow drop-down list.



3. Press the Start button. The OmniPage Toolbox displays the steps in the workflow and acts as a progress monitor. The Workflow Status panel shows progress in more detail. To stop the workflow before it completes, press the Stop button.
4. If run-time input selection is specified, the Load Files dialog box awaits your choice of files.
5. If you requested a step requiring interaction (image enhancement, manual zoning, or proofing) the program presents pages for attention.
6. When a page is enhanced, zoned or proofed, click the Page Ready button in the Toolbox or appropriate dialog box to move to the next page.



7. When the last page is enhanced, zoned or proofed, or when you no longer want to do zoning or proofing, press the appropriate

Document Ready button on the Toolbox. Any pages without zones will be auto-zoned.

8. The After Completion menu under Process / Workflows gives you three options to end a workflow. You can choose to close the document, close OmniPage, or shut down your computer. These settings are typically applied if the workflow runs unattended - if your workflow is so, remember to include a saving step.

You can also run workflows from an OmniPage Agent icon on the Windows taskbar. Right-click it for a shortcut menu listing your workflows. Select one to run it. OmniPage will be launched if necessary. If it is running with a document loaded, the Start Workflow dialog box displays where you can choose what to process from the current document: only the Workflow-defined pages, all pages, selected pages, or the current page.

If you do not see the OmniPage Agent icon, enable it in the General panel of the Options dialog box or choose Start › All Programs › Nuance OmniPage 17 › OmniPage Agent.

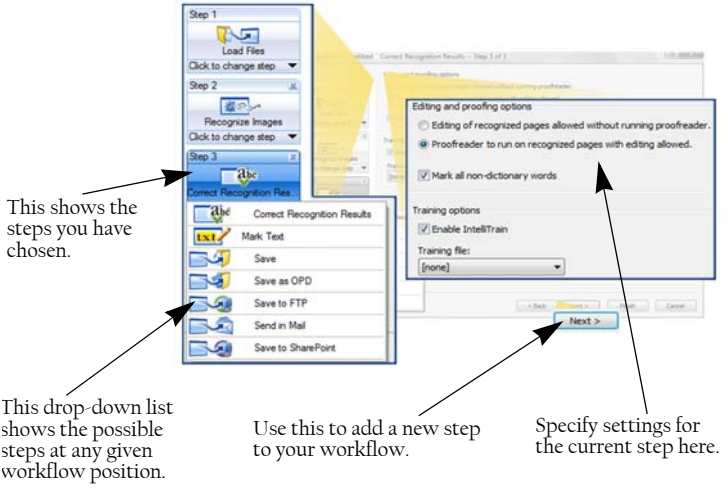
You can launch some workflows from your desktop, from Windows Explorer or the Easy Loader. Right click on an image file icon or file name for a shortcut menu. Multiple file selection is possible. Choose OmniPage 17 and a workflow name from the sub-menu. This sub-menu also provides quick access to six target formats using default settings: Word, Excel, PDF, RTF, TXT and WordPerfect. To customize which workflows you would like to see here, click the Add and Remove Workflows menu item. Only workflows with run-time prompting for input files are listed here.

Pressing Stop while a workflow is running pauses it. Click Start to resume processing. If you pause a workflow, maybe do some manual processing, and then save the document as an OmniPage Document, when you later open that OmniPage Document, the interrupted workflow will resume.

Workflow Assistant

This allows you to create and modify workflows. The Job Wizard also uses this to create or modify workflows that jobs execute - see the next section. The Assistant offers one or more steps, each with a drop-down list. This left panel of the Workflow Assistant dialog box lets you build your workflow.

.



Click the Close button to delete a workflow step.

All subsequent, dependent steps will also be removed.

To change a step, click this arrow and select from the ones in the drop-down list.

At any moment in the process, the Assistant drop-down menu offers all steps that are logically possible at that point.

In OmniPage 17 Professional, additional steps are available: Extract Form Data and Mark Text.

Creating workflows

Select New Workflow... in the Workflow drop-down list, or from the Process menu. Or click the Workflow Assistant button in the Standard toolbar when no workflow is selected.

The opening Assistant panel offers two starting points:

Choose **Fresh Start** to begin with no steps in the workflow diagram on the right. Accept or change the default workflow name. Then click Next and choose your first step. Choose an image loading step that can take input from file, scanner or digital camera files. Specify settings on the right. Then move on to build your workflow: it can include a variety of different steps. When done, click Finish.

Choose **Existing Workflows** to see a list of existing workflows. These are the sample workflows plus any you have created. Select one as source. Its steps will appear in the workflow diagram on the right. Enter a name for your new workflow. Click Next to proceed; modify its steps and settings as described in the next section. The changed settings apply to the new workflow only and are not written back to the workflow used as the source. Any changed settings enter the new workflow, but do not affect the settings in the program. Finally, select Finish to complete your new workflow.

Modifying workflows

Select the workflow you want to modify in the Workflow drop-down list and click the Workflow Assistant button in the standard toolbar. Or choose Workflows... in the Tools menu, select the desired workflow and click Modify... . The first panel of the Workflow Assistant appears with the workflow loaded. Click the icon in the workflow diagram that represents the step you want to modify. Click the downward pointing arrow under the icon to replace this step with another one. Continue modifying steps and/or settings as desired. Remember that deleting or modifying a step may result in later, dependent steps being removed. Click Next to replace removed steps or to add new ones. Click Finish to confirm the changes to your workflow.

After creating or modifying a workflow, you must either run a workflow or select the 1-2-3 item in the Workflow drop-down list, to return to normal processing.

Workflow to Kindle

The Kindle Assistant in the Tools menu helps you create a simple workflow that will accept input, perform OCR and send the results in a suitable format to a Kindle account at Amazon; it will then appear on the Kindle device registered to that account. See "Sending to Kindle" on page 82.

Batch Manager

The Batch Manager is a separate but integrated program to let you create jobs to be processed immediately, or at some time in the future. By choosing steps carefully, you can set up jobs that can run unattended. A job executes a

workflow according to the job settings. Jobs are created in the Job Wizard.

In OmniPage Professional 17 you have the following additional Batch Manager capabilities:

- Setting job timing and recurrence
- Folder watching for incoming image files
- E-mail inbox watching for incoming attachments (Outlook and Lotus Notes)
- E-mail notification of job completion to specified recipients
- Driving workflows with barcodes.

Creating new jobs

Open the Batch Manager from the Process Menu or from your system, by choosing Start › All Programs › Nuance OmniPage 17 › OmniPage Batch Manager or from the OmniPage Agent on the taskbar.

Creating a job is basically timing a workflow. To do this, start the Batch Manager (as described above) and click the Create Job icon or choose Create Job from the File menu.

The Job Wizard starts. First you need to define your job type. You can create five different types, instances of two basic categories: Normal and Watch type.

Normal and Watch type jobs may have a recurrence pattern. The latter are tailored to monitor a specified folder or e-mail inbox for incoming images to be processed in OmniPage. A specific type within this category is Barcode cover page jobs, where barcode cover pages are used to identify which workflow to carry out.

Normal job: Set starting time and specify or create the Workflow to be run. If you select 'Do not start now' use the Activate button in the Batch Manager to start it.

Job types available in OmniPage Professional 17 only:

Barcode cover page job: This is a special type of folder watching job (see below). It monitors a folder for incoming barcode pages, then processes subsequently incoming images with the workflow identified by the barcode. For details, see Barcode processing later in this chapter.

Folder watching job: Select this job type and browse to the folder(s) to be watched for incoming image files.

Outlook mailbox watching job: This job watches an Outlook e-mail inbox for incoming image attachments of a specified type.

Lotus Notes mailbox watching job: Same as above, but a Lotus Notes inbox is watched.

Name your job and click Next.

The next panel shows Start and Stop Options. Specify Start and End Time, set whether input files are to be deleted or saved when the job is completed. If you have a job requiring user interaction, choose whether to allow it or not with the checkmark *Run job without any prompts*. This lets you run such jobs in two ways, avoiding the need to create two jobs. If you plan to be at the computer as the job runs, de-select the checkmark. If you want to run the job without being present, select the checkmark. Then only automatic image enhancement will run, auto-zoning will replace manual zoning and proofing is skipped. In this case you must ensure that the input and saving file sets and locations are pre-defined.

In OmniPage Professional you can set a recurrency pattern and request e-mail notification when the job is completed.

From the next panel onwards, you can construct your job (except for barcode cover page jobs) as you normally do with Workflows. Set your starting point (Fresh Start or Existing Workflows) and proceed as described in the Workflows topic.

The Options dialog box in the Batch Manager is in the Tools menu. Its General panel has an option *Enable OmniPage Agent on system tray at system startup*. By default it is on. It must remain selected for jobs to run at their scheduled time. The option is provided so it is possible to prevent all jobs from running without having to disable them individually. Its state also governs the running of barcode cover page jobs.

The General panel lets you limit the number of pages allowed in an output document, even if the file option *Create one file for all pages* is selected. When the limit is reached, a new file is started, distinguished by a numerical suffix.

Click Finish to confirm job creation.

Modifying jobs

Jobs with an inactive status can be modified. Select the job in the left panel of the Batch Manager and choose Modify from the Edit menu or click the Modify Job button. First, modify timing instructions as desired. Then the Workflow Assistant appears with the workflow steps and settings loaded. Make the desired changes as already described for workflows. See "Modifying workflows" above.

Managing and running jobs

This is done with the Batch Manager. It has two panels. The left panel lists each job, its next run, status and history. The status is:

Waiting:	Scheduled but job start time is in the future.
Running:	Processing is currently underway.
Watching:	Watching is in progress but there is no processing.
Inactive:	Created with timing instruction: *Do not start now*; or any deactivated jobs.
Expired:	Scheduled job but start time is in the past.
Collecting:	Watching in progress but the job is waiting for all incoming files to arrive.
Paused:	User has paused the job and not yet resumed it.
Closing:	Watch type job is saving its result.
Starting:	The status right before Running. Displays when a job is just being started or when more jobs are about to run than the number of jobs Batch Manager can simultaneously run.

Click on a job and a step-by-step analysis of all pages in the job appears in the right panel. It shows where input was taken from, the page status and where output was directed to. Click on a plus icon to see more information about the page. Click on a minus icon to hide details. For jobs with the error or warning status, the listing shows which pages failed or what problems occurred.

Activate Job in the File menu serves to activate any inactive job immediately.

Deactivate Job in the File menu deactivates any active job. If the job is running, this will stop it before deactivating. Choose this to close a Watch type job immediately to save its result.

Stop Job in the File menu stops a job with status Starting, Running, or Paused.

Pause Job is available for jobs with status Running or Starting. To modify such a job's timing instructions you must stop it.

Resume Job lets the job continue from its state when it was paused.

Delete Job in the Edit menu serves to delete the currently selected job. Only Inactive jobs can be deleted.

Rename Job serves to modify the name of any job.

Use the Edit menu to send a copy of a job's status report to Clipboard.
Use Save OPD As... in the File menu to save any intermediate result of a paused job to an OPD file.

To remove data files click Edit, then choose **Clear Occurrence**. This removes files storing the reporting data from the current occurrence of the current job. **Clear All Occurrences** removes all data for all job occurrences of the selected job. These two options are useful to free disk space, but cleared occurrences cannot be viewed any more, so use these with caution.

The Workflow viewer

The Workflow viewer, as displayed in the Workflow Status panel, is integrated into the Batch Manager to the right of the list of your jobs. Use it to get comprehensive and detailed information about the processing of each occurrence of the job. The viewer shows the process in a step-by-step fashion - following the steps of the workflow. It displays input and output page information at each stage, allowing you to quickly view any page. Job results are marked by icons. Drop-down lists give you information about processing steps.

Watched folders

In OmniPage Professional 17, you can specify watched folders and e-mail inboxes (Outlook and Lotus Notes) as job input. These allow processing to be started automatically whenever image files are placed in pre-defined folders or arrive into inboxes as e-mail attachments. This is useful to have sets of files with predictable content arriving from remote locations processed automatically on arrival, even if no-one is in attendance. Typically these are reports or form-like documents that are delivered repeatedly or at recurring intervals, for example each week or month.

To use this facility, prepare a set of folders or e-mail folders to be watched. You should not use these folders for other purposes, not even for barcode cover page jobs. When setting up such a job, choose Folder watching job, name it and click Next. In the dialog box that appears, browse to the folders.

Add a watched folder to the list using this Browse for Folder dialog box.

Specify an image file type.

Add the desired folders and file types (one type or all types). Click the checkbox in front of your selected folder to include its subfolders as well. To enable a number of file types, add the Folder

repeatedly, once for each type. Add a checkmark to watch subfolders of the selected folder as well.

When you reach the next panel of the Job Wizard, you set the timing instructions: a starting time and an end time for the watching to occur. You can specify recurrences, for instance to have the folder(s) watched only during your lunch hour (Start 12.15, End 13.05) every Monday, Wednesday and Friday, or overnight in the last three days of each month, when you keep your computer running to collect and process monthly reports arriving from afar.

When files enter a watched folder, the program waits for approximately the interval specified in Batch Manager Options for more files to arrive in order to process them together. When files cease to arrive, processing starts.

To finish the watching early, choose Deactivate Job. Then you can modify the job freely.

Watched mailboxes

In OmniPage Professional 17, you can specify watched mailboxes as job input. These allow processing to be started automatically whenever image files of specified file types are placed in pre-defined e-mail folders. This is useful to have sets of files with predictable content arriving processed automatically on arrival, even if no-one is in attendance.

The program supports watching Microsoft Outlook and Lotus Notes mailboxes.

Barcode processing

In OmniPage Professional 17, you can run workflows (sets of steps and their settings) using barcode cover pages that define which workflow should run. A barcode cover page identifies a workflow (with workflow identifier, workflow name and workflow steps) and contains information on workflow creation (name of the creator, date of creation, etc.). Note that barcode processing cannot be recurrent.

There are two ways of doing barcode processing:

Scanner input:

Workflow processing is driven by placing the cover page on top of a document to be scanned and pushing the scanner's Start button.

Image file input:

Job processing is driven by copying the barcode cover page image into a watched folder that will receive the document images to be processed.

For scanner input you have to

1. Create a workflow that contains the processing steps you need with Scan Images as first step.
2. Print a barcode page that identifies the workflow.
3. Start barcode processing from the scanner.

To scan with a barcode page:

1. Place the barcode cover page on the top of the document in the ADF.
2. Press the Start button on the scanner.

3. Select “Barcode cover page workflow” as Scanner button default action on the Scanner tab of Options. You can also set it to *Prompt for workflow*. In this case, a dialog box appears with the available choices: Scanning, Barcode cover page workflow, and all scanning workflows.

All available pages will be processed by the specified workflow, or until a new barcode page is encountered. The result will be saved as specified by the workflow.

For image input you must create a barcode cover page job.

A barcode cover page job uses a special kind of watched folder. Always use a separate folder for barcode processing. The starting time for the workflow is defined by the moment the barcode cover page enters a watched folder.

For a barcode cover page job processing you need to

1. Create a workflow that contains the processing steps you need. Select Load Files as input with “Select files for loading each time this workflow is started” selected.
2. Save a barcode cover page that identifies the workflow.
3. Define timing instructions for barcode folder watching in the Batch Manager by creating a barcode cover page job.

To process with a barcode cover page job:

1. Make sure that the job is running at the required time.
2. The folder is being monitored and the workflow will be started as soon as a barcode cover page is placed in the specified watched folder.
3. The workflow will process image files arriving in the folder after the cover page.

4. The workflow will be completed at the specified end time of the job, or each time a new barcode cover page is detected.

You can copy the barcode cover page image and the image files into the watched barcode folder yourself, or direct others to do this. You can also place just a barcode cover page image file in the watched folder, then have a network scanner make and send image files there.

File-it Assistant

The File-it Assistant lets you create scanning workflows for repeated document conversion tasks. The Assistant is for scanning jobs that require no user interaction during the processing. In a typical scenario operators at a scanning station prepare documents, applying the appropriate barcode cover page to each, without needing to know anything about the later processing or destination of the documents, because all that is pre-determined. Associate a button on your scanner with OmniPage (see Chapter 3 under Scanning) and print a barcode cover page to identify your workflow. As a result, you can scan, convert and save without interaction beyond pressing the scanner button.

Create the workflow:

1. Select File-it Assistant from the Tools menu.
2. Name your workflow, choose an output file type, location and file name.
3. Review and optionally change the workflow settings.
4. Print the barcode cover page.
5. Associate OmniPage with a scanner button (must be done only once) in the Control Panel. See “Scanning to OmniPage and workflows” on page 39.

Use the workflow:

1. Place the printed barcode cover page on top of a document in your scanner.
2. Push the OmniPage-associated scanner button. The document will be converted using steps and settings from the referenced workflow and sent to the location you defined.

It is possible to use barcode cover pages stored as image files to drive jobs from watched folders. Such jobs permit interactive steps like manual zoning and proofing that are not available via the File-it Assistant.

Technical information

This chapter provides troubleshooting and other technical information about using OmniPage 17. Please also read the Readme file and other help topics, or visit the Nuance web pages.

Troubleshooting

Although OmniPage is designed to be easy to use, problems sometimes occur. Many of the error messages contain self-explanatory descriptions of what to do – check connections, close other applications to free up memory, and so on.

Please see your Windows documentation or OmniPage Help for information on optimizing your system and application performance.

Supported file formats are listed here, Help provides more detail.

Solutions to try first

Try these solutions if you experience problems starting or using OmniPage:

- Make sure that your system meets all the listed requirements. See the Installation and setup chapter.
- Make sure that your scanner is plugged in and that all cable connections are secure.
- Visit the support section of Nuance's web site at www.nuance.com. It contains Tech Notes on commonly reported issues using OmniPage. Our web pages may also offer assistance on the installation process and troubleshooting.

- Use the software that came with your scanner to verify that the scanner works properly before using it with OmniPage.
- Make sure you have the correct drivers for your scanner, printer, and video card. Visit Nuance's web page through the Help menu and consult its scanner section for more information.
- Defragment your hard disk. See Windows online Help for more information.
- Uninstall and reinstall OmniPage, as described in the section, "Uninstalling the software" in the Installation and setup chapter.

Testing OmniPage

Restarting Windows XP or Vista in its safe mode allows you to test OmniPage on a simplified system. This is recommended when you cannot resolve crashing problems or if OmniPage has stopped running altogether. See Windows online Help for more information.

To test OmniPage in safe mode:

1. Restart your computer in safe mode by pressing F8 immediately after you see the 'Starting Windows' message.
2. Launch OmniPage and try performing OCR on an image. Use a known image file, for instance one of the supplied sample image files.
    - If OmniPage does not launch or run properly in safe mode, then there may be a problem with the installation. Uninstall and reinstall OmniPage, and then run it in Windows safe mode.

- If OmniPage runs in safe mode, then a device driver on your system may be interfering with OmniPage operation. Troubleshoot the problem by restarting Windows in Step-by-Step Confirmation mode. See Windows online Help for more information.

Text does not get recognized properly

Try these solutions if any part of the original document is not converted to text properly during OCR:

- Look at the page image and ensure that all text areas are enclosed by text zones. If an area is not enclosed by a zone, it is generally ignored during OCR. See the section on creating and modifying zones, in the "Processing documents" Chapter.
- Make sure text zones are identified correctly. Reidentify zone types and contents, if necessary, and perform OCR on the document again. See "Zone types and properties" in the "Processing documents" Chapter.
- Be sure you do not have an unsuitable template loaded by mistake. If zone borders cut through text, recognition is impaired.
- Adjust the brightness and contrast sliders in the Scanner panel of the Options dialog box. You may need to experiment with different settings combinations to get the desired results.
- Use the Image Enhancement Tools to optimize your image for OCR.
- Check the resolution of the original image. Hover the cursor over a page thumbnail for a popup display. If the resolution is significantly above or below 300 dpi, recognition is likely to suffer.

- Make sure the correct document languages are selected in the OCR panel of the Options dialog box. Only languages included in the document should be selected. In particular, setting an Asian language for non-Asian texts (and vice versa) is likely to produce unusable results.
- Recognition results in Japanese, Korean and Chinese can be viewed and saved only if your system has East Asian language support. See "Asian language recognition" on page 61.
- Turn IntelliTrain on and make some proofing corrections. This is most likely to help with stylized fonts or uniformly degraded documents. If IntelliTrain was running, try turning it off – on some types of degraded documents it may not be able to help. See "IntelliTrain" on page 64.
- Do some manual training, or edit existing training to remove unsuccessful training.
- If you use True Page as the Text Editor formatting level or for export, recognized text is put into text boxes or frames. Some text may be hidden if a text box is too small. To view the text, place the cursor in the text box and use the arrow keys on your keyboard to scroll to the top, bottom, left, or right of the box.
- Check the glass, mirrors, and lenses on your scanner for dust, smudges or scratches. Clean if necessary.

Problems with fax recognition

Try these solutions to improve OCR accuracy on fax images:

- Ask senders to use clean, original documents if possible.
- Ask senders to select Fine or Best mode when they send you a fax. This produces a resolution of 200 x 200 dpi.

- Ask senders to transmit files directly to your computer via fax modem if you both have one. You can save fax images as image files and then load them into OmniPage. See "Input from image files" in the Processing documents Chapter.

System or performance problems during OCR

Try these solutions if a crash occurs during OCR or if processing takes a very long time:

- Check image quality. Consult your scanner documentation on ways to improve the quality of scanned images.
- Break complex page images (lots of text and graphics or elaborate formatting) into smaller jobs. Draw zones manually or modify automatically created zones and perform OCR on one page area at a time. See "Working with zones" in the Processing documents Chapter.
- Restart Windows XP or Vista in safe mode and test OmniPage by performing OCR on the included sample image files.

If you are performing multiple tasks at once, such as recognizing and printing, OCR may take longer.

Supported file types

Supported image file formats for loading are TIFF, PCX, DCX, BMP, JPEG, JB2, JP2, GIF, PNG, XIFF, MAX, PDF, XPS and HD Photo.

Supported file types for saving recognition results as text are:

HTML 3.2, 4.0
Microsoft Excel 97, 2000, XP, 2003, 2007
Microsoft PowerPoint 97
Microsoft Publisher 98
Microsoft Word 97, 2000, XP, 2003 (WordML), 2007

OmniPage Documents

PDF (Normal), Edited, with image on text, with image substitutes

RTF Word 6.0/95, RTF Word 97, RTF Word 2000, RTF 2000 ExactWord

WordPad

WordPerfect 12, X3

Text, Text with line breaks, Text - Formatted, Text - Comma Separated

Unicode Text, Unicode Text with line breaks, Unicode Text - Formatted, Unicode Text - Comma Separated

Wave Audio Converter (to save recognized text being read aloud)

In OmniPage Professional 17 there is also support for:
eBook, Microsoft InfoPath (for forms), Microsoft Reader, and XML.

Index

Click a page number to jump to the referenced item.

(E) = Image Enhancement tool
(F) = Form handling tool

Symbols

.NET Framework 3.0 12, 81

Numerics

3D deskew 46

A

Accuracy
  improvement 38, 63, 104
  influence of brightness 38
  influence of despeckling 45
  influence of training 63
  scanning influence 38
Acquire Text menu items 33
Activating OmniPage 18
Adding
  attachments to mail 81
  to zones 52
  training to training files 65
  words to user dictionary 57
  workflow steps 90
Additive area selection (E) 44
ADF 34, 39
Advanced saving options 78
Advice on problems 102
Agent to start OmniPage 17, 87
Alphanumeric zones 50
Amazon Kindle 82
Area definition for SET tools 44
Arial Unicode MS 63
Asian language recognition 61
Asian texts, vertical 49
Assigning OmniPage to scanner buttons 39
Attachments to mail 81
Auto-detect layout 40
Automatic Document Feeder (ADF) 34, 39
Automatic training 64
Auto-sending by mail 81
Auto-zoning 40
Auto-zoning vertical text 49

B

Backgrounds for zoning 48
Barcode processing 98
Basic processing steps 21
Batch Manager 90
Black-and-white
  images 75
  scanning 38
Blacking out confidential words 68
Bold text 66
Boxes 67
Boxes for recognized text 105
Brightness 38, 104
Brightness / Contrast (E) 45
Bring to Front tool (F) 72

C

Changing
part of a page 68
reading order 67
views 21, 26
Changing workflows 90
Character attributes 66
Character Map 59
Characters, suspect 56
Checkbox tool (F) 72
Checking OCR results 58
Chinese 61
Circle text tool (F) 72
Classic View 21, 22
Clipboard
sending recognition results 74
Color
images 75
markers 58
scanning 38
Color dropout for forms 45
Coloring image areas 46
Comb tool (F) 72
Comparing recognized words with originals 58
Composition of workflows 85
Contrast 38, 104
Contrast / Brightness (E) 45
Convert Now Wizard 37, 81
Converters multiple 78
Converting from PDF 81
Converting image files 87
Copying to Clipboard 74
Cover pages for barcode processing 98
Creating
new workflows from existing ones 89
training data 65
workflows 89
Crookedly scanned pages 46
Crop (E) 45
Ctrl to avoid panel redocking 21
Custom Layout 41
Custom views 26
Customizing export converters 78

D

Decreasing image resolution 46
Deleting
jobs 95
training files 65
user dictionaries 60
Describing document layout 40
Deskew (E) 46
Deskewing digital camera images 46
Desktop 21
Desktop launching of workflows 87
Despeckle (E) 45
Dictionaries 57
Digital camera input 35, 46
Direct OCR 32
Disabling job running 93
Disk space 11
DMS 84
Docking panels 21
Docking position display 21
Document Layout, Form 41
Document Manager 21, 22
Document Ready button 86
Documents
double-sided 39
exporting 74
in OmniPage 20
layout description 40
saving 74

sending to Clipboard 74
with varied layout 40
Document-to-document conversion 40
DOCX Word 2007 support 12
Dot removal from images 45
Double-sided documents 39
Drawing zones in Direct OCR 34
Dropout color (E) 45
Dropping graphics from export 76
Dual screens 24
Duplex scanners 39
Dynamic verifier 58

E

East Asian language support 12, 61
Easy Loader 21, 23, 36
Easy Loader in Quick View 26, 37
Editing
character attributes 66
form objects 73
graphics 66
in True Page 67
on-the-fly 68
paragraph attributes 66
PDF output 80
recognized text 66
tables 53, 66
training files 65
user dictionaries 60
vertical texts 49
Editor
formatting levels 56
E-mail notification of job completion 91
Embedding items in OPDs 20
Embedding templates in OPD files 54
Enabling OmniPage taskbar icon 87
Encryption for PDF 81
English embedded in Asian texts 61
Error messages from jobs 94, 95
Excel 2007 (XLSX) 12, 106
Existing workflow as new workflow source 89
Explorer, loading files from 37, 87
Export converters 78
Export Results button 76
Exporting
graphics 76
in Flowing Page 77
in True Page 77
repeated 74
to Clipboard 74
to file 76
to Kindle 82
to mail 81
to PDF 80
Extracting form data 73
Extracting items from OPDs 20
Extracting text from PDF files 81

F

Fast recognition and saving 25
Fax recognition 105
Features, new 7
File-it Assistant 100
Files
as export target 75
as image source 34
retained on uninstall 18
separation options 76
types for export 76
Fill (E) 46
Fill text tool (F) 72
Financial dictionaries 61

Finding
non-dictionary words 57
suspect words 57
Finishing
proofing in a workflow 86
workflows 89
zoning in a workflow 86
Flexible View 21, 23
Flipping images 45
Floating panels 21
Flowing Page 77
Form Arrangement toolbar 72
Form data, extracting 73
Form drawing toolbar 71
Form objects, editing 73
Form processing with dropout 45
Form zone 51
Formatted Text 57
Formatted Text level 77
Formatting levels 57, 76
Formatted Text 57
Plain Text 56
True Page 57
Formatting toolbar 21
Frames 67, 77, 105
Framework 3.0 (.NET) 12
Fresh start for new workflow 89
FTP sites 84

G

Get and Convert 37
Graphic tool (F) 72
Graphic zones 51
Graphics
editing 66
in export 76
Grayscale
images 75
scanning 38
Grouping elements 67

H

Header/footer indicators 56
Hearing texts read aloud 70
Help display 21, 27
Hiding / showing markers 56
Highlighting text 68
History of image enhancement 46
Horizontal alignment tools (F) 72
Hue / Saturation (E) 45
Hummingbird 84
Hyperlinks 66

I

Ignore backgrounds 48
Ignore zones 51
Image enhancement
history 46
in workflows 47
tools 43
Image files
conversion 87
input 34
reading order 34
samples 103
Image panel 21
Image requirements 35
Image toolbar 21
Images
backgrounds 48
black-and-white 75
color 75
cropping 45
deskewing 46

editing 66
flipping 45
grayscale 75
quality 39
resolution 46, 75, 104
rotating 45
saving 75
size requirements 35
substitutes in PDF 80
iManage 84
Improving accuracy 38, 64, 104
Increasing memory 104
Input
from digital camera 35
from image files 34
from PDF files 34
from scanners 38
via Easy Loader 36
Installing
OmniPage 12
scanners 14
IntelliTrain 64, 105
Interactive job steps 92
Italic text 66

J

Japanese 61
Jobs
disabling 93
error messages 94, 95
managing 94, 95
modifying 93
notification of completion 91
page limit 93
recurrent 97
running 94, 95
running without prompts 92
status 94, 95
timing instructions 97
Joining zones 52

K

Kindle 8, 82
Korean 61

L

Language choices verified 62
Languages 61, 105
Launch
target application 76
workflows from desktop 87
Layout description 40
Layout retention 57
Layout, auto-detect 40
Legal dictionaries 57, 61
Legal documents 41
Letter outline strengthening 45
Levels of formatting 57
Line tool (F) 71
Linearized PDF 81
Links to web pages 66
Loading
Image Enhancement templates 47
image files 34
images from Windows Explorer 37
images with Easy Loader 26, 36
training files 65
user dictionaries 60
zone templates 42, 53
Lotus Notes 91, 92, 97

M

Mail 81
Mailbox watching 97
Managing jobs 94, 95

Manual 3D deskewing 46
Manual deskewing 46
Manual training 64
Manual zoning 48
Marked words in Editor 56
Markers 56, 58
Marking text 68
Maximising workspace 24
Maximum image sizes 35
Medical dictionaries 57, 61
Memory requirements 11, 104
Microsoft .NET Framework 74, 81
Microsoft Outlook 81, 91, 92, 97
Microsoft Word, opening PDF files in 81
Minimum image sizes 35
Minimum system requirements 11
Modifying
  image quality 42
  jobs 93
  tables 53, 66
  zone templates 54
  zones 51
Modifying workflows 90
MRC compression 81
MS Word 2007 support 12
Multicolumn areas 67
Multi-page image files 75
Multiple column pages 41
Multiple converters 78

N

New features 7
Noise removal from images 45
Non-dictionary words 56
Non-printing characters 56
Notification of job completion 91
Numeric zones 50

O

OCR
  Batch Manager 90
  checking OCR results 58
  Direct OCR 32
  poor performance in 106
  proofreading results 57
  settings for Direct OCR 32
OCR Brightness (E) 45
OCR image 42
OCR/Primary image (E) 44
ODMA 84
OmniPage
  activating 18
  assigning to scanner buttons 39
  documents in 20
  earlier versions 12
  installing 12
  new features 10
  reinstalling 18
  starting 14
  testing 103
  uninstalling 18
OmniPage Agent 17, 87
OmniPage desktop 21
OmniPage desktop views 21
OmniPage Documents 20
  saving as 74
OmniPage Professional 10
OmniPage Toolbox 22
OmniPage Workflow Starter 17, 87
One-button processing 26, 37, 39
On-the-fly editing 68
OPD files
  embedding items 20
  extracting items 20
  template embedding 54

Opening image files 34
Operating system requirements 12
Optimized PDF for web display 81
Optimizing brightness 38
Options dialog box 28
Options for proofing 57
Options for saving 78
Order of page elements 67
Original image 42
Original image saving 75
Outlook 91, 92, 97
Overview of processing steps 21

P

Page Image panel 21
Page limit for jobs 93
Page Ready button 86
Pages
  deskewing 46
  multi-page image files 75
  navigation 22
  sending as mail 81
  sending to Clipboard 74
Panels 21
PaperPort 19, 29
Paragraph
  editing attributes 66
  styles 66, 76
Passwords for PDF 81
Pausing workflows 87
PDF converting from/to 81
PDF Edited 79
PDF file input 34
PDF flavors 79
PDF linearized 81
PDF to MS Word 81
Pending pages 68
Performance problems during OCR 106
Pixel sizes for images 35
Plain Text in Editor 56, 77
Plain Text for export 77
Pleading numbers 41
Pointer (E) 44
PowerPoint 2007 (PPTX) 106
Preprocessing images 42
Primary image 42
Primary/OCR Image (E) 44
Problems with faxes 105
Process backgrounds 48
Process zones 51
Processing
  basic steps of 21
  from other applications 32
  manual 32
  step-by-step 32
  steps, overview 21
  with workflows 86
Professional dictionaries 57, 61
Professional version 10
Program panels 21
Progress reports from workflows 95
Prohibited zone shapes 52
Proofing
  in a workflow 86
  options 57
Properties of zones 49
Purpose of training 63
Purpose of workflows 85

Q

Quality of images 39
Quick Convert View 21, 25

Quick Convert View with Easy Loader 26, 37

R

Reading order 67
Reading text aloud with RealSpeak 69
Recognition
  accuracy 39, 63, 104
  languages 61, 105
  problems with faxes 105
  saving results 76
  speeding up 105
Rectangle tool (F) 71
Recurrent jobs 92, 97
Redacting text 68
Redocking panels 21
Reducing image area 45
Registration 17
Reinstalling OmniPage 18
Removing image edges 45
Removing noise from images 45
Removing workflow steps 90
Removing zone templates 54
Repeated exporting 74
Replacing zone templates 54
Requirements for Asian language support 12
Requirements for input images 35
Resetting views 23
Resolution 75, 104
Resolution (E) 46
Retaining paragraph styles 76
Re-training 64
Rotate (E) 45
Running
  Batch Manager jobs 93
  jobs without prompts 92
  workflows 86

S

Safe mode 103
Sample image files 103
Saturation / Hue (E) 45
Saving
  and launching 76
  as OmniPage Document 74
  documents 74
  options 78
  original images 75
  PDF files 79
  recognition results 76
  text 76
  to file 75
  to mail 81
  to multiple file types 78
  training files 65
  user dictionaries 60
  zone templates 54
Saving and applying Image Enhancement templates 47
Scanners 105
  drivers 15
  duplex 39
  setting up 14
Scanning 38
  input from 38
  pictures 38
  to workflows 39, 100
  Wizard 14
Scheduled processing 90
Searchable PDF 80
Searching PDF output 80
Select Area (E) 44

Selection tool (F) 71
Send to Back tool (F) 72
Sending
  pages by mail 81
  to Clipboard 74
  to Kindle 82
SET tools 43
  defining an area 44
Setting up a scanner 14
Setting up Direct OCR 33
Settings
  Acquire Text 33
  for Direct OCR 33
  Options dialog box 28
  zone types 53
Settings for workflows 88
SharePoint 84
Simplified UI 25
Single-column pages with tables 41
Sizes for input images 35
Skipping interactive job steps 92
Slow recognition 106
Smart folders 96, 97
Solutions for poor performance 102
Specialized dictionaries 61
Speed zoning 52
Spreadsheet pages 41
Standard toolbar 22
Starting a user dictionary 60
Starting Batch Manager 91
Starting the program 14
Status of jobs 94, 95
Step-by-step processing 21
Steps for workflows 88
Stopping workflows 87
Storing zoning changes 68
Straightening pages 46
Strengthening letter outlines 45
Striking out text 68
Subtractive area selection (E) 44
Suggestions in proofing 57
Suspect words 56
Synchronize views (E) 45
System or performance problems during OCR 106
System requirements 11

T

Tabbed panels 21
Table tool (F) 72
Table zones 51
Tables
  editing 66
  editing dividers 53
  in single column pages 41
  in Text Editor 66
  removing dividers 53
  rows in 53
  zones 51, 53
Taskbar workflow icon 87
Technical information 102
Template zones 42, 53, 104
Template, form 73
Templates in OPDs 54
Testing OmniPage 103
Text direction 49, 62
Text Editor 21, 56, 66
Text saving 76
Text tool (F) 71
Text-to-Speech facility 70
Thumbnails 21, 22
Tiled panels 21
Timing of jobs 97
Toolbar docking / floating 58

Toolbars 27
Training 63
  automatic (IntelliTrain) 64
  manual 64
  training files 65
Troubleshooting 102
True Page 57
True Page editing 67
True Page export 77
TWAIN scanner drivers 15
Types of zones 49

U

Underlined text 66
Undocking panels 21
Ungrouping elements 67
Uninstalling the software 18
Unloading
  training files 65
  user dictionaries 60
  zone templates 54
URLs 66
User dictionaries 57, 60
User interaction in workflows 86
Using Direct OCR 33

V

Verifying language choices 62
Verifying text 58
Vertical arrangement tools (F) 72
Vertical dictionaries 61
Vertical text 61
Vertical text, auto-zoning 49
Viewing input or output files 95
Viewing vertical texts 49
Viewing workflow progress 95
Views 21
  changing 21, 26
  Classic 22
  Custom 26
  Flexible 23
  Quick Convert 25
  resetting 23
  using Window menu 23

W

Warning messages from jobs 95
Watched folders 96, 97
Watched mailboxes 97
Web access for activation 12
Web display with PDF files 81
Web page links 66
Window menu for view control 23
Windows Explorer 37, 87
Wizard for direct conversions 37, 81
Wizard for scanner setup 14
Word 2007 (DOCX) 106
Word files as input 40
Workflow Assistant 32, 88
Workflow Status 21, 27, 95
Workflow viewer 95
Workflows
  composition 85
  creating 89
  finishing 89
  for form data extraction 73
  image enhancement steps 47
  pausing and stopping 87
  running 86
  started from scanner 39
  steps and settings 88
  taskbar icon 87
  user interaction 86
  viewing status 95
Working with zones 51

Workspace management 24

X

XPS 12, 81, 106
XPSX Excel 2007 12

Z

Zones 50
  adding to 52
  alphanumeric 50
  changing types 51
  deleting templates 53
  graphic 51
  ignore 51
  in Direct OCR 34
  irregular 52
  joining 52
  manual 48, 104, 106
  modifying templates 53
  numeric 50
  process 51
  prohibited shapes 52
  properties 49
  replacing templates 54
  saving templates 54
  table 51, 53
  templates 42, 53, 104
  types 49, 104
  unloading templates 55
  vertical Asian text 62
  working with 51
Zoning in a workflow 86
Zoning on-the-fly 68
Zoom (E) 44
Zooming displays 22, 58

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